STRANGERS IN A STRANGE LAND

sparks & honey   Culture Forecast / January 2019

TABLE OF CONTENTS

Navigating this report

METHODOLOGY

Data-driven and expert-informed cultural intelligence.

1
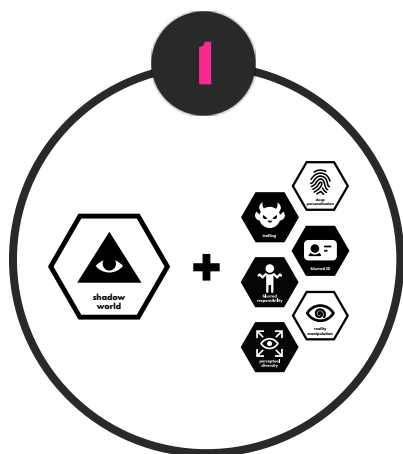
DATA
ANALYTICS

Using our active learning system Q,™ we identified high-energy, high-momentum macro trends with strong current and near-future relevance and explored their interactions with adjacent forces of change.

2

CULTURAL
FORENSICS

We conducted desk research using public and academic databases to understand the deep contexts of the three macro trends and to frame algorithms we subsequently used in our cultural listening.

3

CULTURAL
LISTENING

We used a suite of proprietary tools and methodologies to explore and analyze hundreds of millions of cultural conversations to understand how consumers have engaged with these macro trends over the past 12 months.

4
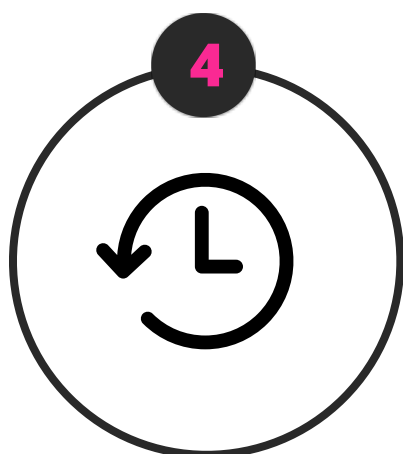
CULTURAL
REWIND

We analyzed how these conversations have evolved, putting the spotlight on topics, ideas and phenomena that generated the most energetic and polarized engagement.

5
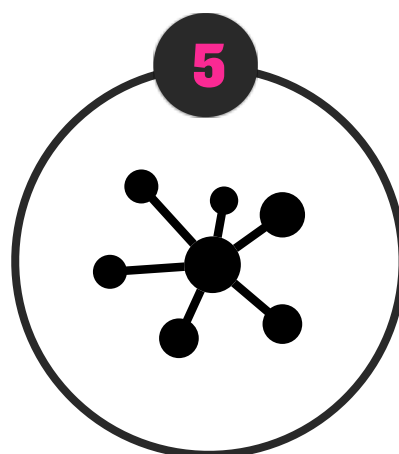
SIGNAL
CLUSTERING

We organized and mapped these signals thematically, then expanded the conversations to surface adjacent and associated concepts with significant cultural energy.

6
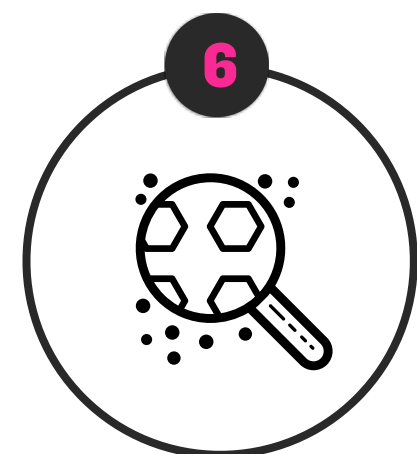
PATTERN
RECOGNITION

We examined the signal clusters to surface patterns of change that point to emerging cultural forces — new and relevant trends with a high likelihood of impacting brands, institutions and consumers in 2019.

ABOUT Q™

sparks & honey uses cultural intelligence to help organizations understand and take advantage of accelerating change. Q™ is our cultural intelligence platform which structures data from thousands of sources to visualize cultural change in real time. The system draws on cultural experts and observers from around the world, while applying proprietary methodologies, tools, algorithms and human insights to provide cultural intelligence to a diverse range of organizations.

PATENTS
ACADEMIA
STARTUPS
MARKETS
SEARCH
SOCIAL
REVIEWS
MUSIC
VIDEO
INDUSTRY VERTICALS

How we translate culture into structured data
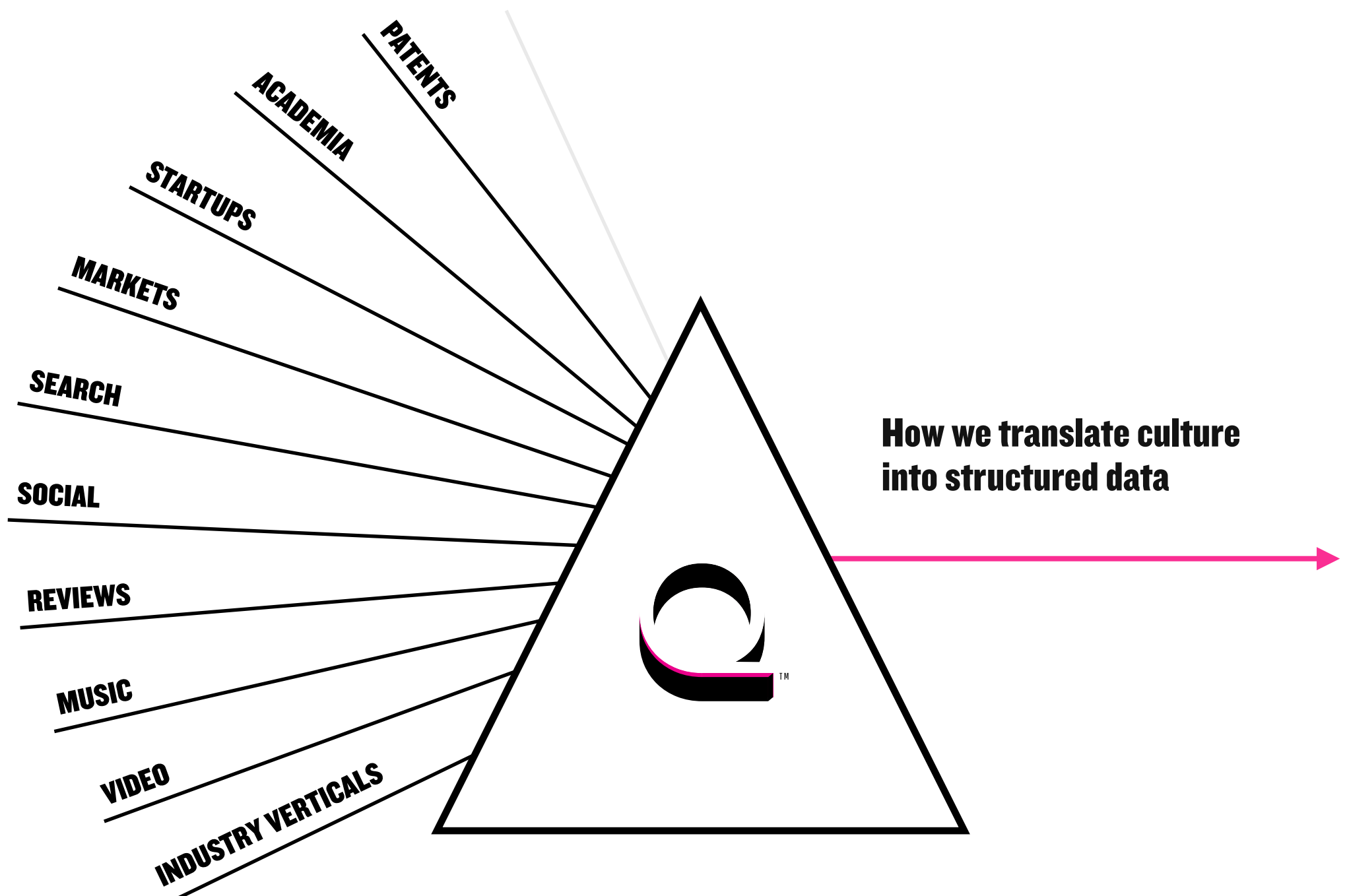
ELEMENTS OF CULTURE

The Elements of Culture are sparks & honey's proprietary framework of persistent, culturally relevant forces that shape attitudes and behavior. They are organized into Mega Trends (larger forces impacting culture at scale over generational spans) and Macro Trends (smaller but still widespread forces with greater energy but more volatility).
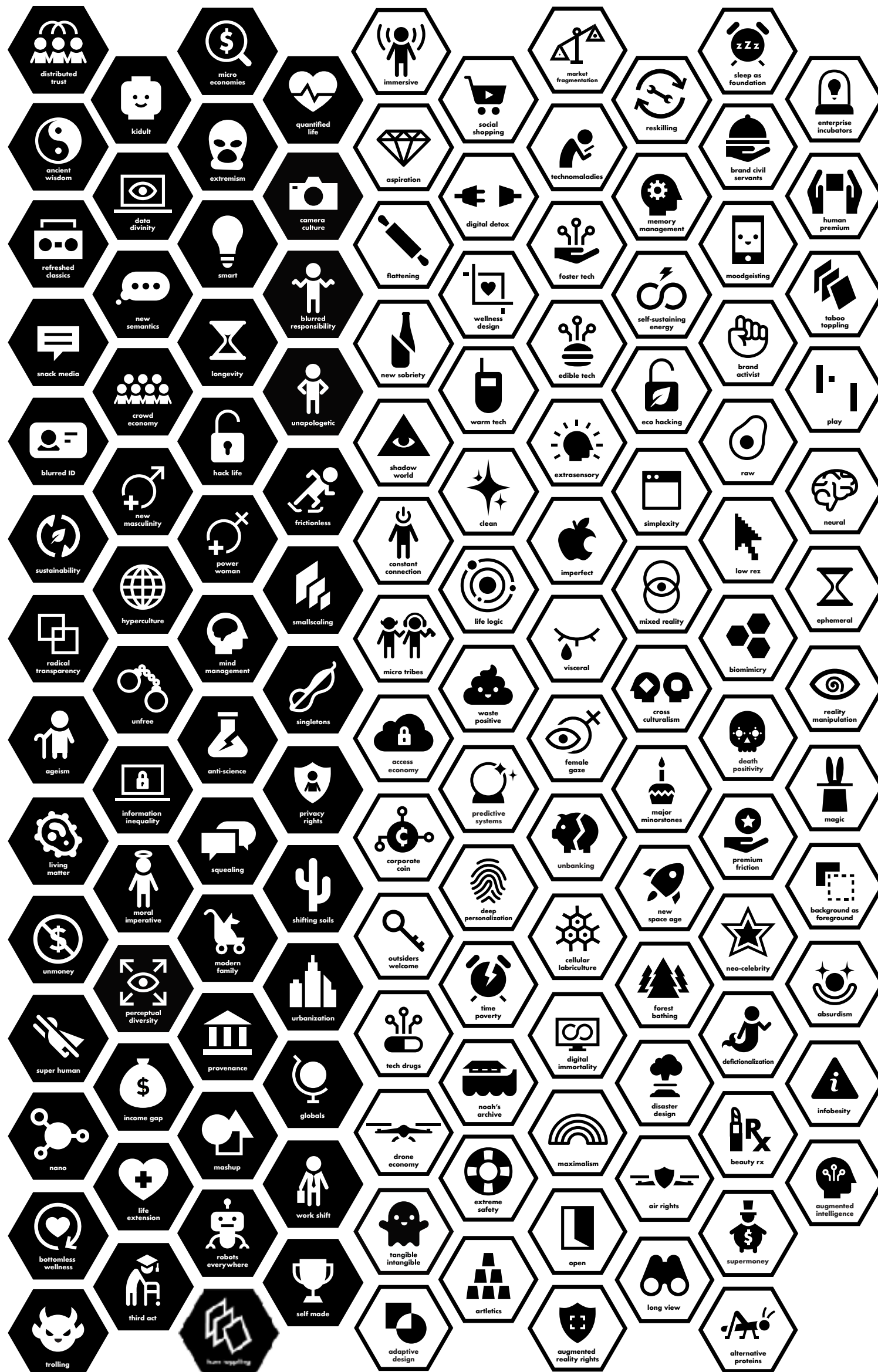
sparks & honey tracks 129 Elements of Culture — 52 Mega Trends and 77 Macro Trends — through our cultural intelligence system Q™ and thousands of other mainstream and emerging trends, such as the ones shared in this report.

Our Elements of Culture are updated regularly to reflect organic and disruptive shifts in the cultural landscape.

⬡ MEGA TRENDS
⬡ MACRO TRENDS

FORCES SHAPING CULTURE IN 2019

The trends identified in this report were generated by analyzing the interactions of three driving forces — Shadow World, Technomaladies and Outsiders Welcome. These three forces are Elements of Culture that, based on our platform, have the greatest energy and momentum heading into 2019, with 24 other EOCs. We then explored the attitudinal and behavioral shifts emerging at their intersections.

DISTRIBUTED TRUST: TRUST IS NO LONGER CENTRALIZED, BUT FRAGMENTED ACROSS NETWORKS

TECHNOMALADIES: GROWING BODY OF DISORDERS STEMMING FROM TECHNOLOGY ADVANCING FASTER THAN HUMANS CAN ADAPT
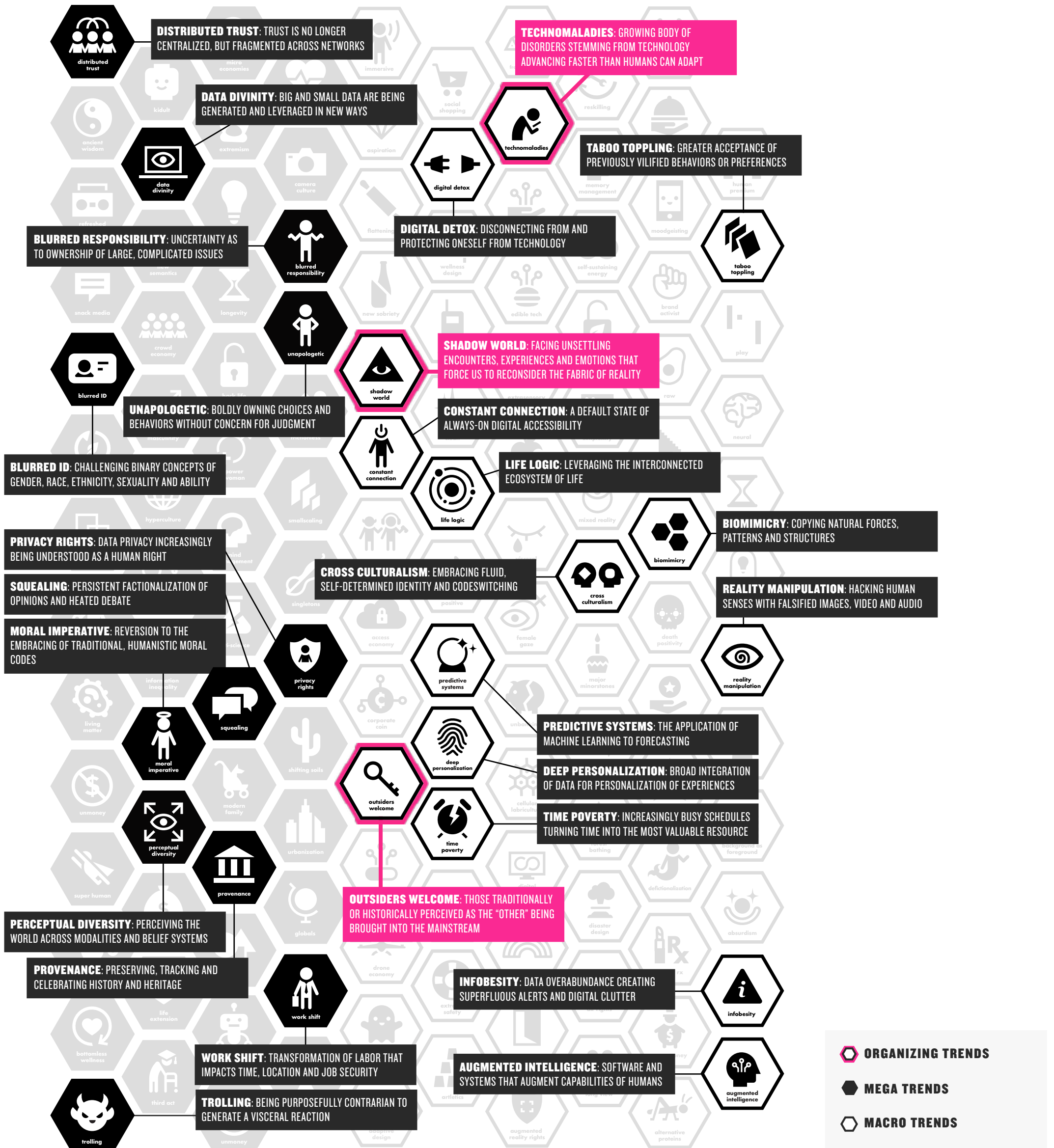
DATA DIVINITY: BIG AND SMALL DATA ARE BEING GENERATED AND LEVERAGED IN NEW WAYS

TABOO TOPPLING: GREATER ACCEPTANCE OF PREVIOUSLY VILIFIED BEHAVIORS OR PREFERENCES

BLURRED RESPONSIBILITY: UNCERTAINTY AS TO OWNERSHIP OF LARGE, COMPLICATED ISSUES

DIGITAL DETOX: DISCONNECTING FROM AND PROTECTING ONESELF FROM TECHNOLOGY

SHADOW WORLD: FACING UNSETTLING ENCOUNTERS, EXPERIENCES AND EMOTIONS THAT FORCE US TO RECONSIDER THE FABRIC OF REALITY

UNAPOLOGETIC: BOLDLY OWNING CHOICES AND BEHAVIORS WITHOUT CONCERN FOR JUDGMENT

CONSTANT CONNECTION: A DEFAULT STATE OF ALWAYS-ON DIGITAL ACCESSIBILITY

LIFE LOGIC: LEVERAGING THE INTERCONNECTED ECOSYSTEM OF LIFE

BLURRED ID: CHALLENGING BINARY CONCEPTS OF GENDER, RACE, ETHNICITY, SEXUALITY AND ABILITY

BIOMIMICRY: COPYING NATURAL FORCES, PATTERNS AND STRUCTURES

PRIVACY RIGHTS: DATA PRIVACY INCREASINGLY BEING UNDERSTOOD AS A HUMAN RIGHT

CROSS CULTURALISM: EMBRACING FLUID, SELF-DETERMINED IDENTITY AND CODESWITCHING

REALITY MANIPULATION: HACKING HUMAN SENSES WITH FALSIFIED IMAGES, VIDEO AND AUDIO

SQUEALING: PERSISTENT FACTIONALIZATION OF OPINIONS AND HEATED DEBATE

MORAL IMPERATIVE: REVERSION TO THE EMBRACING OF TRADITIONAL, HUMANISTIC MORAL CODES

PREDICTIVE SYSTEMS: THE APPLICATION OF MACHINE LEARNING TO FORECASTING

DEEP PERSONALIZATION: BROAD INTEGRATION OF DATA FOR PERSONALIZATION OF EXPERIENCES

TIME POVERTY: INCREASINGLY BUSY SCHEDULES TURNING TIME INTO THE MOST VALUABLE RESOURCE

OUTSIDERS WELCOME: THOSE TRADITIONALLY OR HISTORICALLY PERCEIVED AS THE "OTHER" BEING BROUGHT INTO THE MAINSTREAM

PERCEPTUAL DIVERSITY: PERCEIVING THE WORLD ACROSS MODALITIES AND BELIEF SYSTEMS

PROVENANCE: PRESERVING, TRACKING AND CELEBRATING HISTORY AND HERITAGE

INFOBESITY: DATA OVERABUNDANCE CREATING SUPERFLUOUS ALERTS AND DIGITAL CLUTTER

WORK SHIFT: TRANSFORMATION OF LABOR THAT IMPACTS TIME, LOCATION AND JOB SECURITY

AUGMENTED INTELLIGENCE: SOFTWARE AND SYSTEMS THAT AUGMENT CAPABILITIES OF HUMANS

TROLLING: BEING PURPOSEFULLY CONTRARIAN TO GENERATE A VISCERAL REACTION

⬡ **ORGANIZING TRENDS**

⬢ **MEGA TRENDS**

⬡ **MACRO TRENDS**

We need to end marginalization so that absolutely no one gets left behind... In every community, groups are tired of feeling marginalized due to some aspect of their identity. [But] it is no longer good enough for societies to succeed on average; they need to succeed for everyone.

John McArthur, Senior Fellow at Brookings Institution and at UN Foundation

PREFACE: STRANGERS IN A STRANGE LAND

In 2019, the growing sense of disconnect from the unfamiliar "reality" with which we're surrounded will come to a head.

There is a line that Mohsin Hamid, author of 2017's Booker-shortlisted bestseller *Exit West*, uses regularly, most recently in an interview with *The New Yorker*: "We are all migrants, all of us: We move through space and time." The book itself is a reframing of refugeeism and technology, exploring how physical relocation and virtual dislocation have transformed global culture.

Entering 2019, it feels more timely than ever. We are moving in vast numbers across borders; staring constantly at screens; fluidly shifting our identities in ways that surprise even ourselves. Each of these has contributed to a pervasive sense of disconnect from the world around us — a feeling that we no longer recognize who we are, where we are and where we're going.

As Ipsos Public Affairs found in a recent survey, nearly two-thirds of global consumers say they "don't identify with what their country has become." Two of the markets reporting the strongest sense of alienation are Brazil and the U.S. — both of which have undergone massive political, economic and social upheavals over the past few years, leading to market volatility, government transformation and anxiety about the future.

In 2019, on a global basis, we see this "certainty of uncertainty" accelerating, and the sense of cultural anomie becoming even more profound. Our analysis has identified three trends from our proprietary taxonomy, the Elements of Culture, which we use to map the currents of cultural change over the next 12 to 18 months. These are: Shadow World, a trend tracking

the half-hidden side of existence; Technomaladies, a trend tracking the ways that our obsession with devices and platforms is transforming our lifestyles; and Outsiders Welcome, a trend tracking how we're socially adapting to beliefs and perspectives that don't fit our historical experiences.

Each of these three Elements of Culture (EOCs) are intersecting and cross-pollinating with other trends to produce behaviors and attitudinal shifts that are captured in the 15 trends we are sharing in this report.

We leave you here with another insight from Mohsin Hamid: "Part of the great political crisis we face in the world today is a failure to imagine plausible desirable futures. We are surrounded by violently nostalgic visions…[and] if we can't imagine desirable futures for ourselves, our collective depression could well condemn humanity to a period of terrible savagery."

In 2019, individuals and institutions alike will be approaching a decision fork. One path leads toward a violently nostalgic past. The other path, in turn, leads toward the investments, sacrifices and yes, hope, in Mohsin Hamid's "desirable futures," not just for ourselves, but for the world.

Which path will we choose?

THREE DRIVING CULTURAL FORCES IN 2019

Three macro trends that are poised to define how culture evolves over the next 12 to 18 months

SHADOW WORLD

We are seeing an unsettling of emotion and experience that leads us to consider what forces and agendas exist beyond the visible context of everyday reality.

TECHNOMALADIES

Our overwhelming relationship with technology is changing interpersonal and social behaviors, altering how we think about each other and fueling a radical dependence on our devices.

OUTSIDERS WELCOME

Things that once seemed alternative, eccentric or fringe are now being translated into new standards in policy, communication and creative expression — depicting a more nuanced, fluid and more complicated portrait of humanity.

THE 15 TRENDS SHAPING CULTURE IN 2019

We've done our homework.
Here are the 15 trends set to shape culture in 2019.

We are living in the **SHADOW WORLD**, facing unsettling encounters, emotions and experiences that force us to reconsider our very senses, the motivations of others and in some cases, the very fabric of reality. A cultural force affecting many facets of our individual and collective lives, Shadow World feeds on and amplifies anxiety and paranoia. It prods us to ask, "What and whom can we trust?" The answer, increasingly, is "not much."

IN 2019, WE'RE SEEING INCREASING CONCERNS ABOUT OUR DIGITAL FOOTPRINTS…

IDENTITY INTEGRITY is grounded in the uncanny idea that all of our choices, actions and communications are reflected in a decentralized digital alter ego that can be collected, pieced together, bought and sold and retold. This fragmentation of our personas is affecting our ability to control our personal data and trust our memories — and even our senses.

…AND THE WORLD FEELS MORE AND MORE LIKE A "RASHOMON"-LIKE LANDSCAPE OF CONFLICTING AND CONTRADICTORY PERSPECTIVES…

NEGOTIATED REALITY refers to the constant tension between different, and often equally valid, perceptions of the truth. Your real isn't necessarily my real. The lack of absolute standards and universal principles can make it seem like we've killed common sense — everything is relative, and so, everything is acceptable.

…LEADING US TO CONCLUDE, WITH RESIGNATION, THAT MAYBE NOTHING IS FULLY "TRUE" AT ALL…

ACCEPTED DECEPTION is the casual acceptance of untruths as the norm — there is a level of normative fakeness, falsehood or murky speculation that is baked into how we construct our worlds and communicate with one another. But it isn't always a negative thing — Accepted Deception can mean a suspension of disbelief that opens up the space for playfulness and even hope.

…WHICH IS ENCOURAGING MORE OF US TO EMBRACE ME-FIRST — AND EVEN ME-ONLY — TENETS OF FAITH…

SPIRITUAL SELFISHNESS refers to people turning to more radical self-centeredness in the name of spiritual enlightenment or self-care. The faltering of our core beliefs and trust systems is being countered by a drive to look out for number one: you. A response to external forces of oppression, the trend of Spiritual Selfishness taps into the shadowy roots that allow us to exert the self over all else.

…OR TO TURN TO EXTERNAL SOURCES TO VALIDATE WHAT'S TRUE AND WHAT'S NOT.

VETTING AS A SERVICE refers to the growing need we have to validate identity, conduct audits and confirm facts on-demand with tools and platforms that are designed to help consumers ascertain what senses and gut instinct can no longer do alone. When our truths are constantly wavering, these services are used to double-check the real from the not-so-real.

Technology is giving us abilities no prior generations have ever had before. At the same time, being tethered to our devices, platforms, apps and tools is also reshaping our capacity to focus, as we become inundated with stimuli — and increasingly dependent on them to function. In **TECHNOMALADIES**, we explore how the constant access to technology is forcing us to modify our behaviors to accommodate not just our respective human selves but our cyborg elements as well.

**IN 2019, THE WORLD SEEMS FILLED WITH
NOISE AND DISTRACTING CLUTTER...**

TUNNELING is an attempt to recover fragmented attention and agency as individuals from the chaos of a world that's constantly connected, and therefore too full of noise. Tunneling allows us to impose protective mechanisms, through both technology and analog innovation, to filter out the world at large, create personal safe spaces and expand our abilities for extreme focus.

**...MAKING IT HARDER AND HARDER FOR US TO COMPLETE
THOUGHTS AND FINISH TASKS, DUE TO INFORMATION
OVERLOAD AND INSUFFICIENT COGNITIVE CAPACITY...**

SEMI-PRESENCE refers to a state of never-ending processing. Consumers today exist in perpetual partial attention, hypertasking across platforms, facing stimuli that ask us for more. The net result is we are being caught in a persistent "three-dot state," trapped in an endless flow of information processing and stuck before completion and transmission — leading those around us to wonder if we are simply here, or somewhere else entirely.

**...WHICH IS LEADING US TO PUSH MORE OF
OUR TASKS AND EVEN DECISION-MAKING TO
EXTERNAL DEVICES AND PLATFORMS...**

THINGSOURCING is about expanding our human capacity by exporting our needs — from relationship management to emotional support — to devices and platforms. What we can't or won't do for ourselves, a thing can do for us. Outsourcing our ethical choices to AI, which will make decisions rooted in data that is likely to be biased and skewed, may cast us further from our own guiding force: the gut.

**...CHALLENGING AND COMPLICATING MANY OF
OUR HUMAN RELATIONSHIPS AS A RESULT...**

IT'S COMPLICATED refers to how technology is testing and forging the boundaries of our relationships, from the romantic to the professional, often in strange and unpredictable ways. Terms that have emerged out of digital-era dating behaviors — like breadcrumbing and ghosting — are now moving into other contexts. Did you know you can now "ghost" a job now?

**...AND CAUSING US TO ACTIVELY STEP BACK FROM
IMMERSIVE, ALWAYS-ON TECHNOLOGIES AS A
VACCINATION AGAINST EXCESSIVE ENGAGEMENT.**

DIGITAL MINIMALISM refers to the aspiration of having stripped-down, self-limiting tools and services that are designed for a small number of uses. As devices and interfaces become increasingly complex, Digital Minimalism offers a middle ground from fully disconnecting to being just available enough — on our own terms.

BREAKING THE ORDINARY explores how the path to reconnecting with our world requires the normalization of new and unfamiliar identities, values and behaviors. The expansive nature of identity today means that that which was once deemed "alternative," eccentric or fringe is now being translated into new standards in policy, communication and creative expression.

IN 2019, IDENTITY IS SO FLUID, COMPLEX AND MULTIDIMENSIONAL THAT WE'RE INCREASINGLY BEING DEFINED BY FORMULAS RATHER THAN CHECKBOXES, FOR BOTH BETTER AND WORSE..

ALGORITHMS AS NEW DEMOGRAPHICS examines how formulas and algorithms are replacing checkboxes that we use to understand and create boundaries around our identities. The way we see ourselves is becoming more detailed and complicated, and technology like AI is increasingly being asked to define and predict who we are — for good and for ill.

...REFLECTING A PLETHORA OF NEW SOCIAL STANDARDS AND REAL-TIME SHIFTS IN OUR VALUE SYSTEM...

RENORMING is about how we are responding to real-time shifts in what we value and believe. Manifestations of Renorming are intended to empower and include microtribes of people who have been largely excluded or silenced by the mainstream of society.

...AND EVEN THE BASIC REDEFINITION OF "HUMAN" — GENETICALLY, BIOLOGICALLY AND PHILOSOPHICALLY...

RETHINKING HUMANITY refers to how we are being forced to rethink what it means to be "people," thanks to advances in space exploration, AI, cognitive psychology and digital biology. The potential for the emergence of another intelligent species will impact how we define the fundamentals of personhood, relationships and identity.

...WHICH HAS LED SOME TO ACTIVELY OPT OUT FROM BEING QUANTIFIED AND CATEGORIZED...

BLANK LIKE ME refers to how some people are purposely opting out of being defined or identified at all, propelled out of a desire to control their privacy — or sheer exhaustion in the face of constant self-promotion. More and more, we are seeking to hide being defined by society, building fake profiles or using facial recognition-defying fashions.

...AND OTHERS TO STAY ON EDGE, READY TO EXACT RETRIBUTION ON THOSE WHO STEP ON THEIR NUANCED IDENTITIES OR UNIQUE WORLDVIEWS.

INSTANT COUNTERCULTURE is about how people are inventing and adopting new symbols of marginalized identity in real time. Counterculture is now evolving, expressing — and vanishing — in a matter of days or even minutes. The ease of information sharing is fueling these pop-up countercultures on channels like Reddit or 4chan.

71% of Chinese believe digital technology can make the world a better place. But globally, only 42% believe the same.

— Dentsu Aegis Network and Oxford Economics

LIVING IN THE SHADOWS

Unsettling encounters, experiences and emotions are forcing us to reconsider our senses, the motivations of others and even the very fabric of reality.

shadow
world

With a flash, the sky over New York City turned a mystical blue. [Observers] sensed something was wrong—would you look at the freaking sky?—and formulated explanations. Maybe the glow signaled a massive battle between superheroes. Maybe it was an alien invasion. Maybe the apocalypse was nigh, and the eerie turquoise clouds over Queens were the first sign the end was near.

Marina Karen in The Atlantic, discussing reaction to the eerie blue lights that lit up the sky after a Con Edison explosion in Queens on December 27, 2018

WELCOME TO THE UNCANNY VALLEY

The "uncanny valley" is the eerie, uneasy feeling we get from seeing something that's humanoid, but not quite human. Our present cultural landscape — familiar in shape, but bizarre and unfamiliar in many other ways — has stretched the uncanny valley to encompass the entire world.

We live in an era where reality extends far beyond what the eye can see, our senses can take in, or even our own minds can fully comprehend.

Shadow World captures this half-hidden side of existence, which is manifesting in our day-to-day lives as an undercurrent of the uncanny, causing us to scan the landscape for invisible, intangible presences, with the persistent feeling that something *isn't quite right.*

Shadow World leads to an unsettling of emotion, place, experience; it feeds on and amplifies anxiety and paranoia; it prods us to ask, "What and whom can we trust?" The answer, increasingly, is *"not much."*

Individually, we're losing control of our personas, as they shatter and scatter across a vast digital footprint that can be taken out of context, hacked and misappropriated, and we're disbelieving our senses which can be tricked by technology and deceived by false evidence. We track this through the Identity Integrity trend.

In our relationships and immediate environments, we are in a tug of war between what we want to believe and the perceptions of others. The definition of family, the rules of romantic engagement, the guidelines of proper social behavior — all are in a state of flux. The truth is not "out there," but in the intersections between differing beliefs, in a trend we call Negotiated Reality.

Finally, at the macro level of society, we've become more desensitized to and accepting of falsehood, as normative fakeness becomes pervasive. Data can be falsified, reporting can be faked, images and video can be manipulated or curated into irrelevance. These unapologetic, baked-in untruths are tracked in a trend we call Accepted Deception.

Shadow World leads to an unsettling of emotion, or place; it feeds on and amplifies anxiety and paranoia; it prods us to ask, "What and whom can we trust?" The answer, increasingly, is "not much."

As emerging trends of Shadow World, we're seeing Spiritual Selfishness, people investing in more self-centered beliefs, and Vetting as a Service, turning to tools to validate truths and confirm facts from those lingering in the underbelly of deception.

As a cultural current, Shadow World is shaping a world of consumers that crave enlightenment and escape — things that either lift the veil, or provide a way to forget the lies and untruths around us, and to dispel our growing sense of reality as unfamiliar, uncomfortable and uncertain.

At the same time, we'll likely see a groundswell of backlash in 2019, as consumers challenge the conventions of how they, their world and the world around them are defined, and make drastic departures in how they perceive and share information.

Figure 1.0

FAKE NEWS IS RAMPANT — AND THE CONSEQUENCE IS A GROWING INABILITY TO DISCERN TRUTH

Once upon a time, news organizations were trusted to help us filter out falsehood and key into facts. But the rise of social media has made it harder and harder for us to know what constitutes "news," and which news institutions are reliable.

Where Exposure to Fake News Is Highest

% of consumers who say they've been exposed to completely made-up news in the past year

Country	%
Turkey	49%
Mexico	43%
Brazil	35%
United States	31%
South Korea	30%
Spain	29%
Australia	25%
Canada	19%
Japan	17%
France	16%
United Kingdom	15%
Germany	9%

Uncertainty over Real vs. Fake News

63%

of people worldwide say they don't know how to tell good journalism from rumor or falsehoods

59%

of people worldwide say it's getting harder to tell if a piece of news originated from a respected media organization

Source: 2018 Edelman Trust Barometer

Figure 2.0

SOCIAL MEDIA IS SUFFERING FROM INSTITUTIONAL MANIPULATION — WITH THE U.S. AT THE EPICENTER OF SUCH CAMPAIGNS

As 2016 showed, it's relatively cheap and easy to manipulate social media to engineer false grassroots groundswells of behavior, or to plant rumors and untruths in the minds of unsuspecting social users. Since then, social media misinformation campaigns have gone mainstream and global — and we should assume they're here to stay.

Countries Ranked by University of Oxford's Social Media Manipulation Index (Bigger Text Means Social Media in That Country Is Subject to More Manipulation)

KENYA
VENEZUELA
MEXICO
IRAN
POLAND
AUSTRALIA
NETHERLANDS
NIGERIA
ECUADOR
VIETNAM
CUBA
CHINA
RUSSIA
EGYPT
NORTH KOREA
UKRAINE
UNITED STATES
UAE
BRAZIL
SOUTH KOREA
CAMBODIA
THAILAND
SAUDI ARABIA
ISRAEL
PAKISTAN
MALAYSIA
SOUTH AFRICA
ITALY
TURKEY
ARGENTINA
TAIWAN
AUSTRIA
COLOMBIA
PHILIPPINES
UK
SYRIA
INDIA

Source: Calculated using data from the University of Oxford's Computational Propaganda Research Project

2018 TIMELINE: SHADOW WORLD

A snapshot of a year in Shadow World: 2018 saw some of the most potent and polarizing cultural conversations around the themes of identity fragmentation, trust in our social networks and unease in the falsehoods of our institutions and icons.

2018 gave us more evidence that we're losing control of our personas and digital footprints and becoming more and more subject to digital trickery of our senses and perceptions

Researchers report that Strava, a popular fitness app for tracking running paths, is tracing the outlines of U.S. overseas military installations. (*The Verge*), (*The Guardian*)

January

After New York's chief prosecutor opens investigation into firms that sell fake followers, Twitter announces a crackdown that eventually reduces the size of some popular accounts—like Katy Perry, Barack Obama and Donald Trump—by millions. (*NY Times*)

January

Reddit bans "deepfake" porn—e.g., AI-driven pornography that convincingly puts celebrity faces onto existing sex clips. Deepfake technology begins to proliferate into other types of video. (Fox News)

February

Massachusetts Attorney General Maura Healey launches investigation into the alleged harvesting of Facebook profiles by Cambridge Analytica, a firm employed by Donald Trump's 2016 election campaign. (BBC) (*Reuters via NY Times*)

March

In 2018, we saw increasing evidence that even our immediate worlds hide uncomfortable (and sometimes frightening) realities

"House of Horrors" case: David and Louise Turpin, an evangelical Christian couple in Perris, California, are arrested for holding captive and abusing their 13 children, who are released after a 17-year-old manages to escape and find help. (BBC)

January

Former CIA officer Jerry Chun Shing Lee is arrested on charges of giving China classified information that allegedly led to the capture of informants and dismantling of a U.S. spy network. (Reuters) (*NY Times*) (*Washington Post*)

January

Chiropractor Larry Nassar is sentenced to 40 to 175 years for molesting Olympic gymnasts under his care, many of them still children. U.S. Gymnastics is accused of failing to act on widespread reports of abuse. (*Chicago Tribune*)

January

A woman in Tempe, Arizona, dies after being hit by a self-driving Uber car, in what appears to be the first death of a pedestrian struck by an autonomous vehicle on public roads. Uber suspends self-driving car tests in response. (*The Guardian*) (BBC)

March

The events of 2018 made us more and more desensitized to and accepting of falsehood at every level of our lives — expressed as suspension of disbelief or bitter fatalism

Russian interference revealed in the 2016 United States elections; it is eventually revealed that the Kremlin-linked troll farm, Internet Research Agency, ran at least 50,000 fake troll accounts during the 2016 elections. (ABC News)

January

A dozen camels are disqualified from Saudi Arabia's King Abdulaziz Camel Festival, after reports in the media that they received injections with Botox to make them more attractive.(NPR)

January

Politically conservative local news broadcast company Sinclair Broadcast Group is criticized for forcing dozens of local anchors to recite the same scripted op-ed about "fake news." (CNN)

March

A report commissioned by the UK states terrorists and extremists are increasingly turning to Bitcoin, the dark web, and encrypted messaging apps in a bid to evade detection. *(The Guardian)*

April

GDPR rules come into effect in the European Union. Several U.S. news sites are subsequently taken offline in the UK and Europe, including the *Los Angeles Times* and *Chicago Tribune*. (*The Independent*)

● May

James Gunn is fired as the director of *Guardians of the Galaxy Vol. 3* after the emergence of old tweets in which he joked about taboo subjects like pedophilia and rape. (*Time*)

● July

Sony releases posthumous Michael Jackson songs from its catalogue that are challenged as having been sung by an impersonator. *(Rolling Stone)*

● August

Senate hears testimony of Christine Blasey Ford alleging that U.S. Supreme Court nominee Brett Kavanaugh sexually assaulted her as a teen. In his rebuttal, Kavanaugh denies the claim, calling it an "orchestrated political hit" to keep him off the Court. (AOL).

● September

IDENTITY INTEGRITY

In first major criminal prosecution of a celebrity abuser in the #MeToo era, Bill Cosby is sentenced to 3 to 10 years in jail, after being found guilty in April of drugging and raping women. (AP)
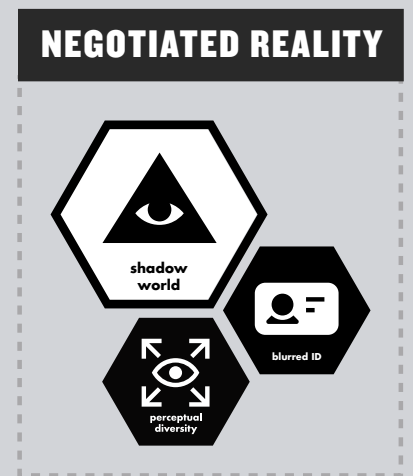
● September

Jacob Wohl, 20-year-old Trump supporter and conspiracy theorist, attempts to frame Trump investigator Robert Mueller as a sexual predator using an invented "investigations agency" Surefire Intelligence. (NBC News)

● November

Heavy metal musician Jered Threatin concocts fake fans, fake label, fake videos and fake interviews to engineer a European tour for himself. (*NY Times*)

● November

After psychiatrist who has practiced for 22 years is revealed to have "no qualifications," UK begins an investigation of over 3,000 physicians with foreign licenses. (CNN)

● November

NEGOTIATED REALITY

Chinese e-commerce giant Alibaba rolls out a blockchain-based app designed to track the sourcing of packaged food in order to block tainted or fake products. (TechInAsia)

● May

Journalist Arkady Babchenko, after reportedly being assassinated in Kiev, Ukraine, appears on live television stating that the assassination was staged. (BBC)

● May

Volkswagen is fined one billion euros by German prosecutors after being convicted of mass cheating on its goverenment-mandated diesel particulate emissions testing. (BBC)

● June

After a decade and a half defrauding investors out of billions and marketing nonexistent technology, blood-testing company Theranos finally shuts down. (NPR)

● September

ACCEPTED DECEPTION
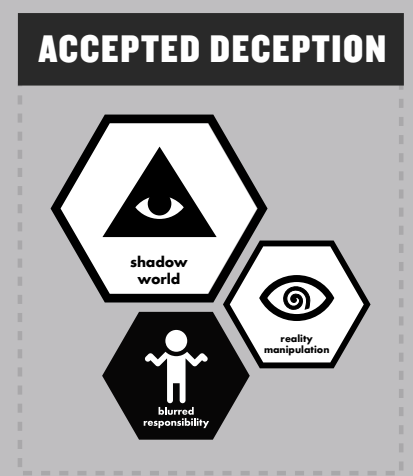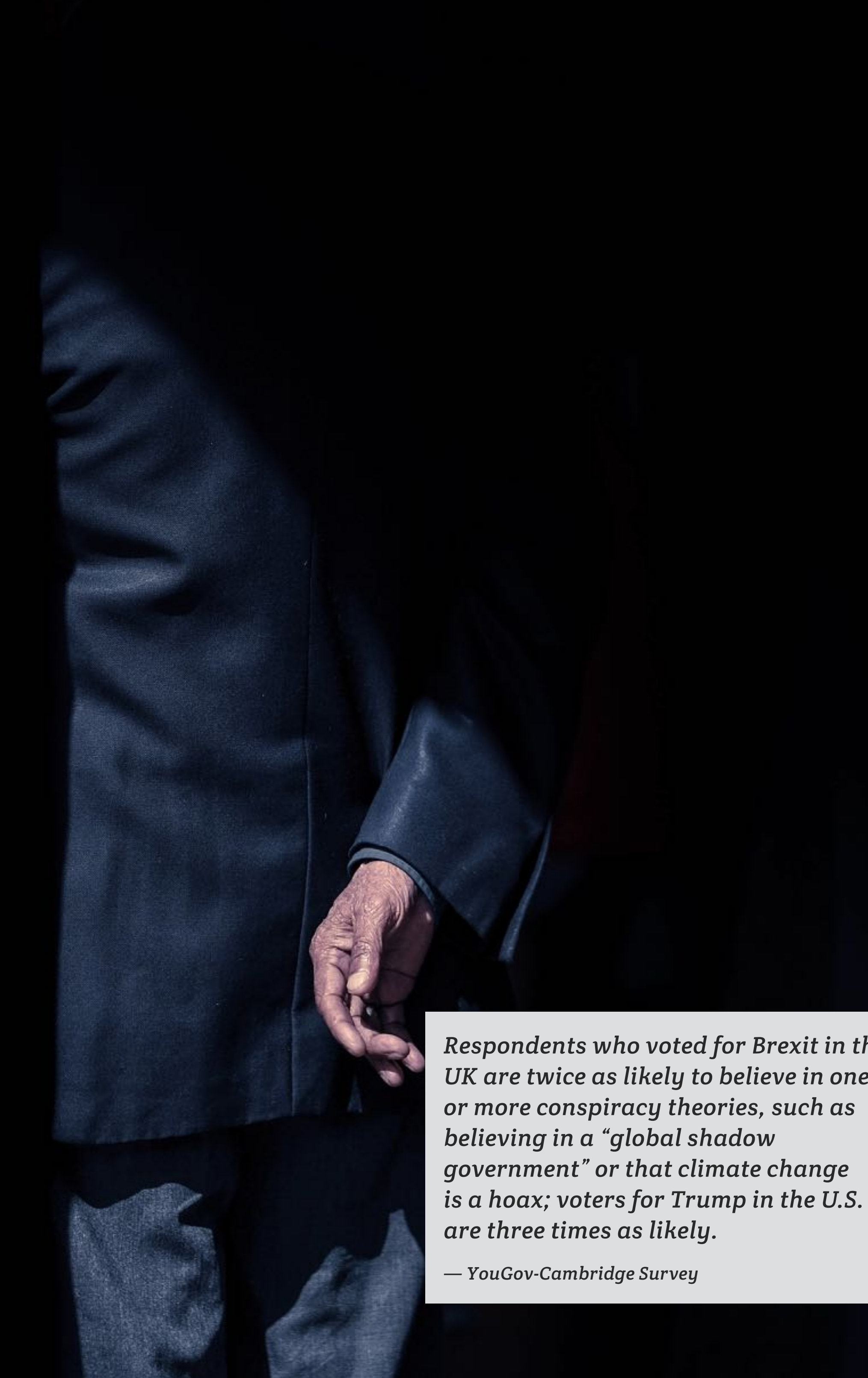
Respondents who voted for Brexit in the UK are twice as likely to believe in one or more conspiracy theories, such as believing in a "global shadow government" or that climate change is a hoax; voters for Trump in the U.S. are three times as likely.

— YouGov-Cambridge Survey

TREND 1
IDENTITY INTEGRITY

A faltering sense of control over who we are

shadow world

distributed trust

deep personalization
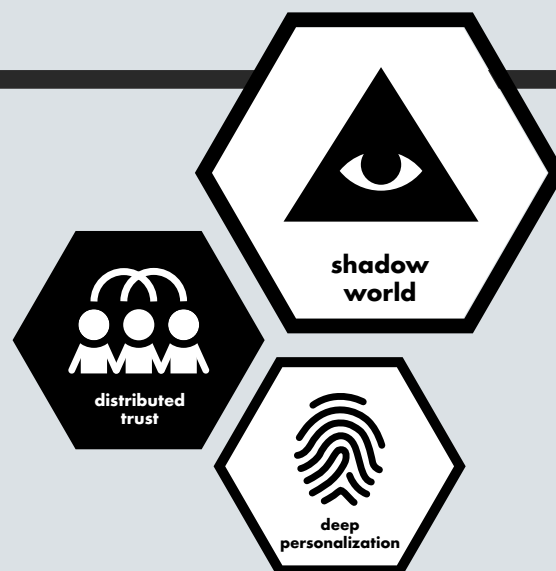
If your face appears in an accessible database, as it probably does, you're effectively a suspect every time it's searched. And you don't have to be a cop to have access to the millions of photos on social-media sites — many of which are labeled automatically.

DEFINING
IDENTITY INTEGRITY

Our personas are becoming fragmented and distributed, as we lose the ability to control our data and trust our memories and senses.

The trails of data we leave behind in our personas are being hacked and tracked to the point where they've spiraled well beyond our control.

We leave footprints of information behind us wherever we travel, in space and in cyberspace — our faces, voices, biometrics and DNA are all up for grabs, to be misappropriated or mashed up without our permission. We are now scattered across hundreds of platforms and databases, and it's impossible to know who is using which pieces and for what purpose.

Identity Integrity is grounded in the uncanny thought that all of our choices, actions and communications are reflected in a decentralized digital alter ego that can be collected, pieced together, bought and sold and retold by a variety of aggregators.

As we send off our DNA to generate personalized wine recommendations or give guidance to our digital assistants using our own voices, the traits that belong to us become exposed and captured, pressed like flowers into digital albums. It's not just us: Businesses who rent out our data, friends who tag us on social,

even parents who overshare childhood images, all contribute to the radical fragmentation of our identities. Our data will outlive us. But in whose hands will it end up?

We are now scattered across hundreds of platforms and databases, and it's impossible to fully know who's using which pieces and for what purpose.

The control we used to have in shaping our own destiny is faltering. Consequently, we have a growing desire for tools, technologies and people that can help us gather and maintain our distributed selves.

85% of Chinese have suffered some sort of data leak, ranging from their phone number being sold to spammers to their bank account details being stolen.

—China Consumers Association

Figure 3.0

CONSUMERS FEEL LIKE THEY'VE LOST CONTROL OF THEIR DATA

Most of us feel like we do not have much choice in managing or securing our data — and those who have control are not doing a very good job.

Do Smart Phone Users Worldwide Feel They Are in Control of Their Personal Data Used by Mobile Apps and Services?

% of global smartphone users who say that...

13%
Feel in control; I am asked for permission and make a conscious choice about how my data is used

14%
Feel I have some choice about my data some of the time

36%
I know that by agreeing to the terms and conditions I am giving permission for them to use my data, but I don't feel I have a choice

12%
Know my personal data is being collected but I am never asked for permission

14%
I didn't know apps and services make use of my personal data

12%
None of the above

Number of Global Data Breaches Pertaining to Identity Theft From First Half 2013 to First Half 2018

H1 '13	H2 '13	H1 '14	H2 '14	H1 '15	H2 '15	H1 '16	H2 '16	H1 '17	H2 '17	H1 '18
357	342	476	452	552	449	621	429	680	1,085	609

NUMBER OF INCIDENTS: 1100, 825, 550, 275, 0
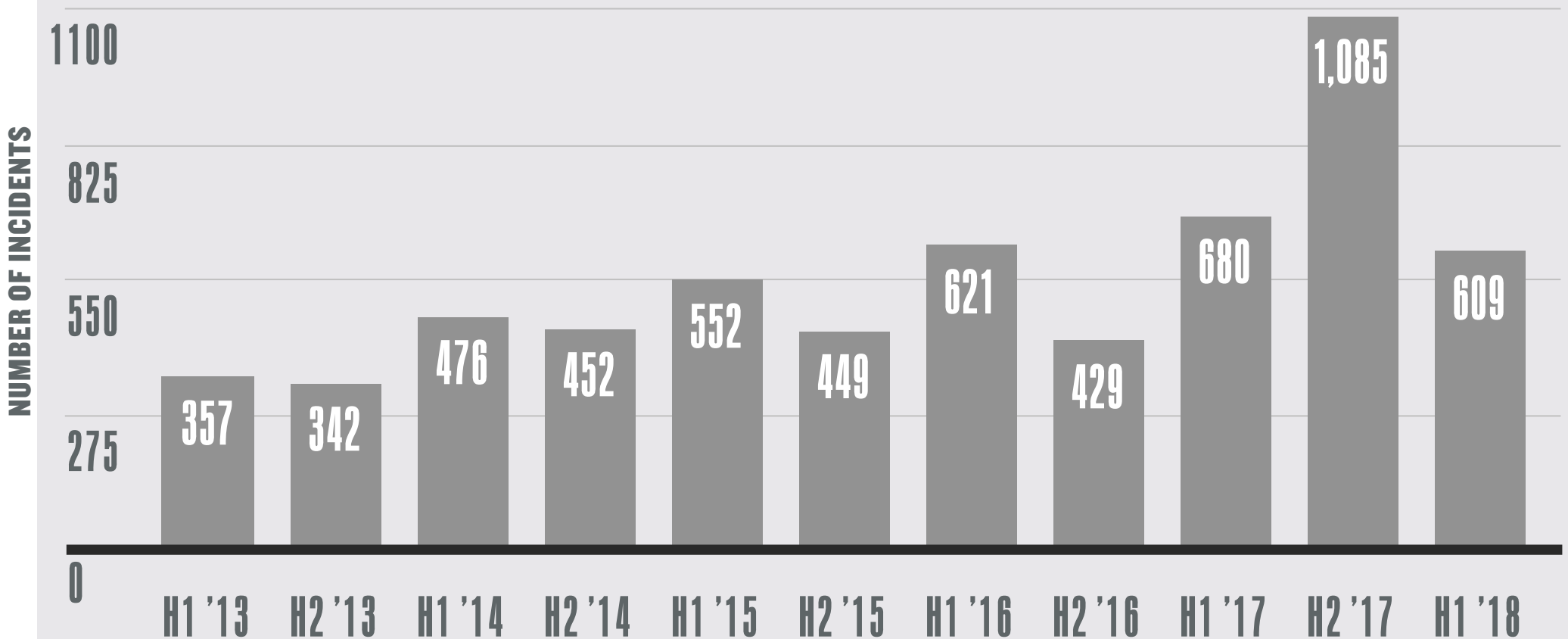
Sources: eMarketer; Gemalto

Figure 4.0

THE YEAR IN IDENTITY INTEGRITY

What are people saying?
Here are the topics that triggered some of the most energetic and polarizing conversations in 2018.

CONVERSATIONS
9.5M

NET POSITIVE SENTIMENT
20%

ENGAGEMENT ●
POSITIVES ●
NEGATIVES ●

JUL 11- AUG 5, 2018
Conversations around Facebook's failure to regulate fake news

861,908 Conversations
9% Net Sentiment

MAR 10 - APR 17, 2018
Conversations around Facebook and Cambridge Analytica

1.2M Conversations
7% Net Sentiment

SEP 16- OCT 17, 2018
Conversations around employers using AI to weed out job applicants

558,811 Conversations
14% Net Sentiment

MAY 4 - JUN 8, 2018
Conversations around Reuters using satellite data to show secret Chinese military bases in South China Sea

730,245 Conversations
17% Net Sentiment

NOV 13 - DEC 6, 2017
Conversations around Carpenter v. U.S., the Supreme Court case on whether warrants are required to search smartphones

360,650 Conversations
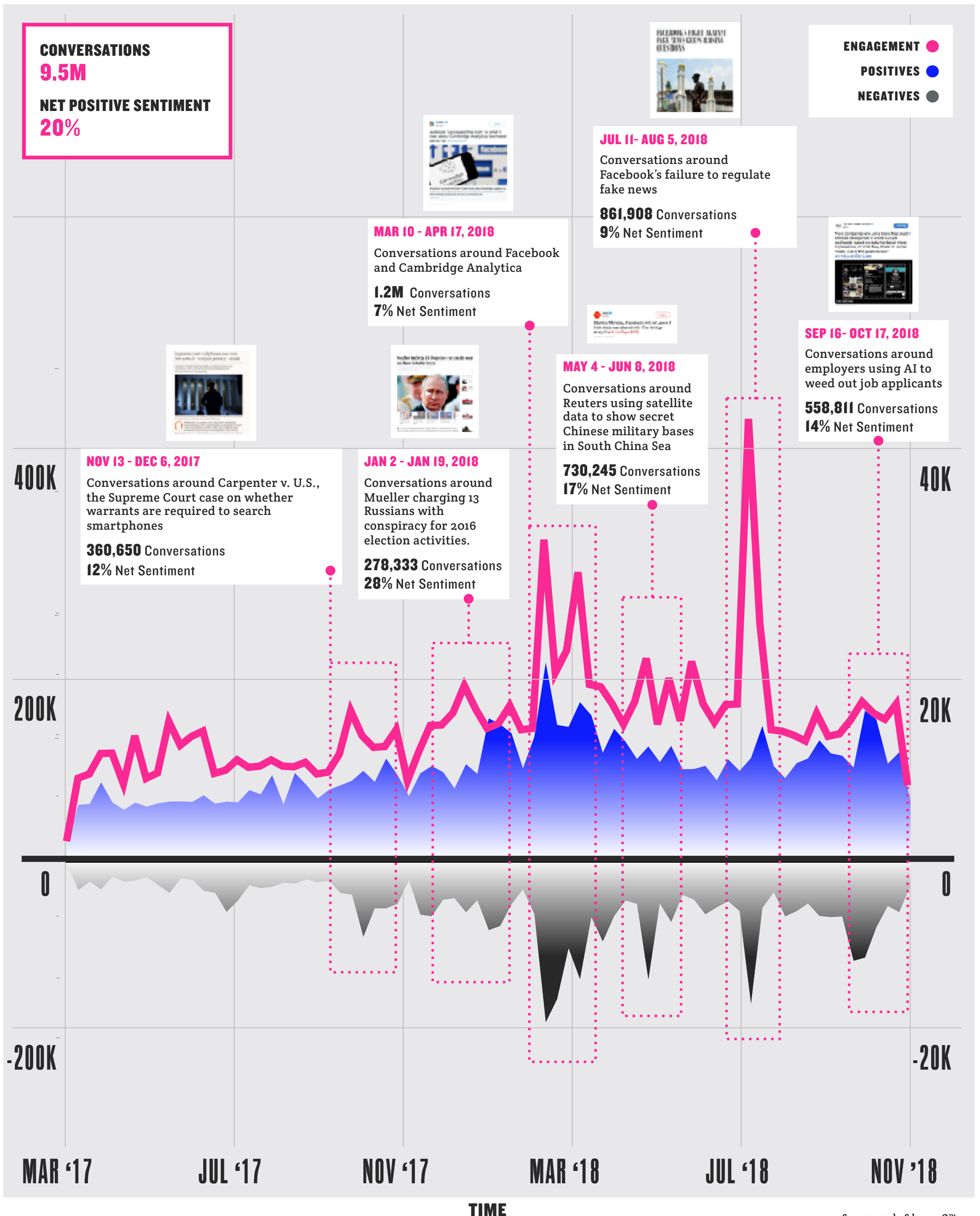**12%** Net Sentiment

JAN 2 - JAN 19, 2018
Conversations around Mueller charging 13 Russians with conspiracy for 2016 election activities.

278,333 Conversations
28% Net Sentiment

400K   40K

200K   20K

ENGAGEMENT

0   0

POSITIVES AND NEGATIVES

-200K   -20K

MAR '17   JUL '17   NOV '17   MAR '18   JUL '18   NOV '18

TIME

Source: sparks & honey, Q™

SOCIAL VERBATIMS:
IDENTITY INTEGRITY

What are people talking about in relation to Identity Integrity? Brands misusing big data, law enforcement snooping through their information, the invisible trail of our digital behavior and the ways that people and institutions steal and misuse content and identity.

CONCERNS ABOUT DIGITAL TRAIL

@coco__f   May 1, 2018

Just started deleting all my old #Emails and I got to some that had pictures I forgot about…. Seriously people, do you know what is hiding at the bottom of your inbox? Everything you forgot in your past life is there haunting you. And showing you digital camera nudies.

@imall__s   December 4, 2018

Law enforcement agencies will soon be able to snoop on your WhatsApp or iMessage conversations.

AlanJones: I'm not sure that people really are entitled to believe they're safe from being invaded even when there's no reason for their privacy to be invade…

ANXIETY ABOUT LAW ENFORCEMENT ACCESS TO DATA

DARK HUMOR ABOUT IDENTITY THEFT

@hans__n   December 8, 2018

ME: Someone stole my identity

FRIEND: Well that sucks

GUY IN NIGERIA RECEIVING HIS FIRST LETTER FROM THE STUDENT LOAN COMPANY: What the fuck

@baby___t   December 8, 2018

my school stole their logo from google images but I'm not allowed to copy someone else's work? nah kys

POINTING OUT CONTENT USAGE HYPOCRISY

SNARK ABOUT GOVERNMENT SURVEILLANCE

@awander__h   December 12, 2018

me using the sketchy free wifi at the patco station so I can use Twitter even though I know the NSA is digitally stealing my biometric data

@thehap__s   December 12, 2018

Thanks Similac for randomly sending me baby formula—now my family thinks I'm pregnant. xx

REPORTING MISUSE OF BIG DATA ANALYSIS

Source: Twitter

CULTURAL SIGNALS:
IDENTITY INTEGRITY

How is culture responding to the Identity Integrity trend? By launching new tools to help us manage our personas — and demanding that we be more careful of what we do in public.
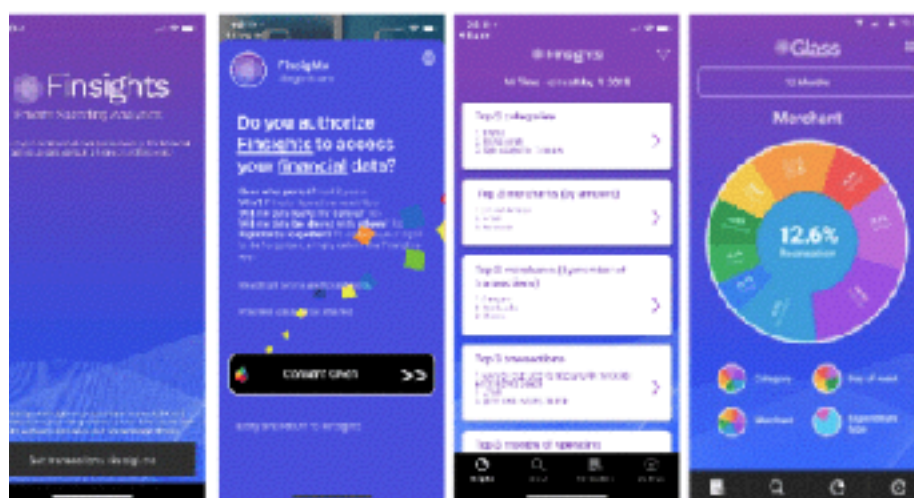
DIGI.ME LAUNCHES WHAT IT CALLS THE "ITUNES OF PERSONAL DATA"

Digi.me is a data aggregator with a difference: It claims to put consumers in control of their own information, providing a series of apps that allow people to manage, manipulate and analyze data across different platforms. Eventually, the company hopes to allow its users to combine health and activity data for better preventative care, analyze how social media affects their purchase history or overall health, move playlists seamlessly across streaming platforms and yes, get paid for volunteering your data to marketers.

A WOMAN LOST A NASA SCHOLARSHIP AFTER GETTING INTO TWITTER BEEF WITH A MEMBER OF NASA'S SPACE COUNCIL

Twitter user Naomi H shared news of her internship at NASA with an emphatic, profanity-laden tweet. Her tweet got a reply from Homer Hickam, a former NASA engineer and member of the National Space Council: "Language." To which Naomi replied, "Suck my dick and balls I'm working for NASA." Hickam then replied with, "And I am on the National Space Council that oversees NASA." Hickam was telling the truth—he's a member of the National Space Council's Users Advisory Group. However, Naomi lost her internship due to NASA seeing the post through hashtags added by her friends, not from Hickam's intervention. In fact, he offered to try to help her get her opportunity back after learning what happened.

HEALTH-CONSCIOUS HITMAN IS CONVICTED BASED ON DATA FROM HIS SMART WATCH

British mob hitman and avid runner and cyclist Mark "Iceman" Fellows was convicted of the murders of two rival gangsters, in part because of his GPS health tracking watch. Although police already suspected Fellows, it was his Garmin Forerunner that linked him to the 2015 murders. Detectives investigating Fellows came across a photo of him wearing his Garmin Forerunner during 2015's Great Manchester 10K two months before the murder of Massey that July. Detectives then located the device and checked its GPS data for files that could link him to Massey.

Sources: Business Insider; ;Runners World

TREND 2
NEGOTIATED REALITY

Your real isn't my real

shadow world

perceptual diversity

blurred ID
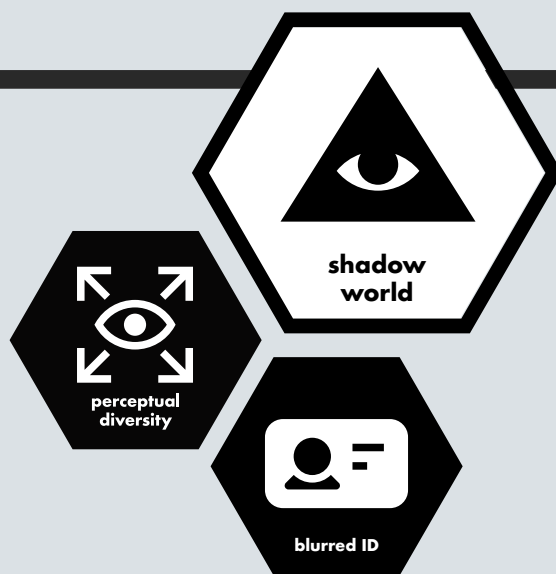
Morality can be a grey area to Gen Z: "Society changes, what's good or bad changes as well. It's all relative." Gen Z, coming of age in an incredibly complex world with access to more information than any other generation, are also the most diverse generation in history. These realities have broadened their horizons, and inculcated a deep sense of empathy.

DEFINING
NEGOTIATED REALITY

Different perceptions of "truth" create a sense of constant tensions — turning social reality into a shifting mass collaboration.

The way we view the world is in a constant tug of war of negotiated perceptions of reality. The fact that one person's "real" isn't another person's "real" is prompting a rising tide of extreme discomfort, rooted in disconnected messages, out-of-kilter expectations and misaligned agendas.
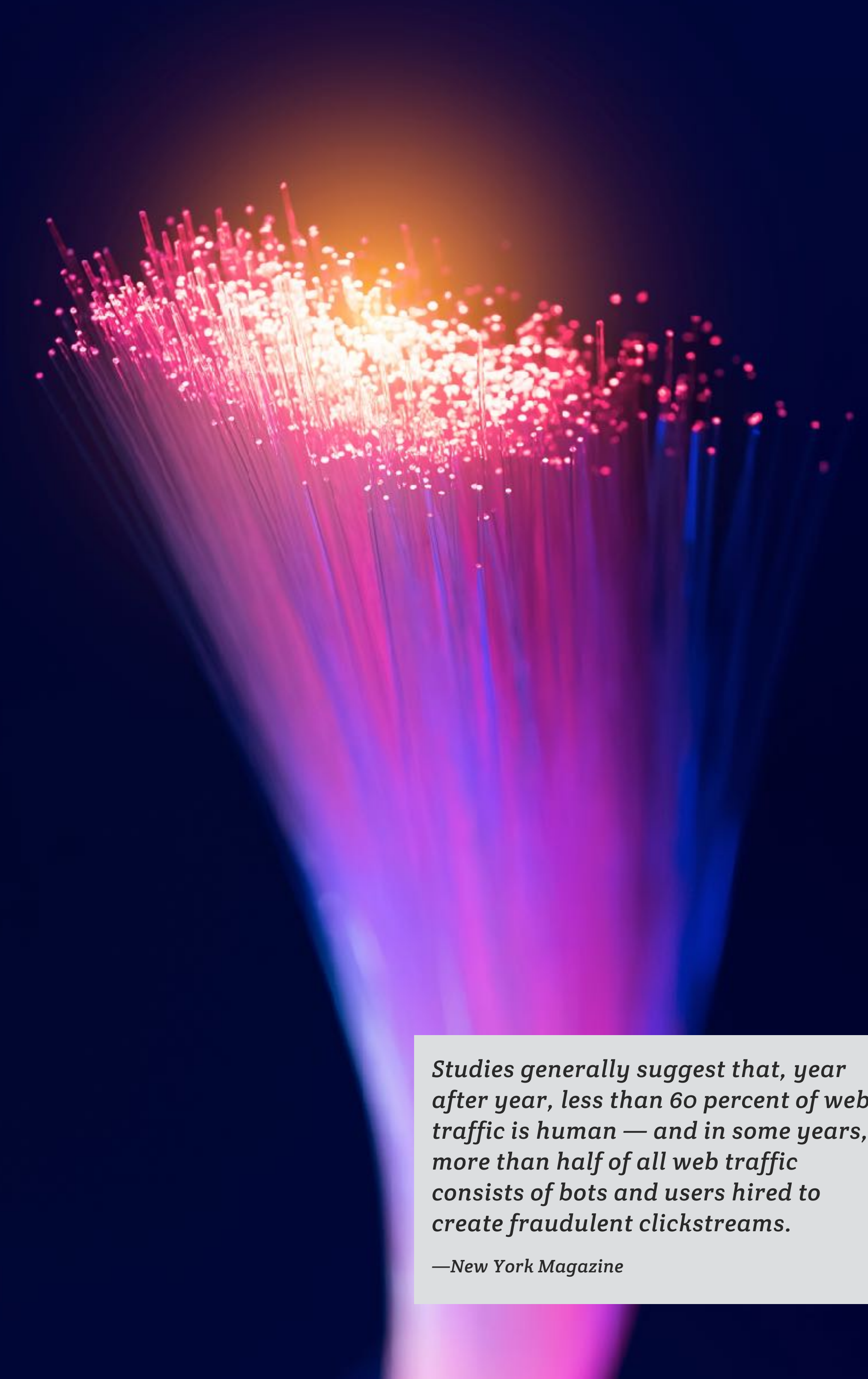
As a result, discontinuities are popping up in the social matrix: Universities are banning clapping in favor of "jazz hands" to avoid triggering PTSD; people are being kicked off of planes for claiming squirrels as "emotional support animals"; relationships are now beginning the way many end — with contracts that lay out boundaries of physical and emotional comfort.

Such connections are rooted in shifting senses of how we see and experience our communities, environments and each other. Anonymity and pseudonymity provide social contacts with cover, allowing us to project our own impressions (or fantasies) upon them. A 24/7 check-in culture feeds us crumbs of the lives of others, without the commitment required for full engagement. These fragmented impressions can result in uncomfortable or even dangerous scenarios, as seen in the phenomenon of catfishing, for instance.

When our realities are all curated, incomplete and negotiated, real, authentic, no-holds-barred connections with others become harder to find — and more valuable.

The lack of absolute standards and universal principles sometimes makes it seem like we've killed common sense — everything is relative, and so, everything is acceptable.

The lack of absolute standards and universal principles can make it seem like we've killed common sense — everything is relative, and so, everything is acceptable. The new blurry, analog, tonal version of Negotiated Reality we've arrived at demands more vigilance and willingness to adapt and evolve continuously — in labeling, in guidelines, in content, in the very understanding of the consumers and constituencies brands serve.
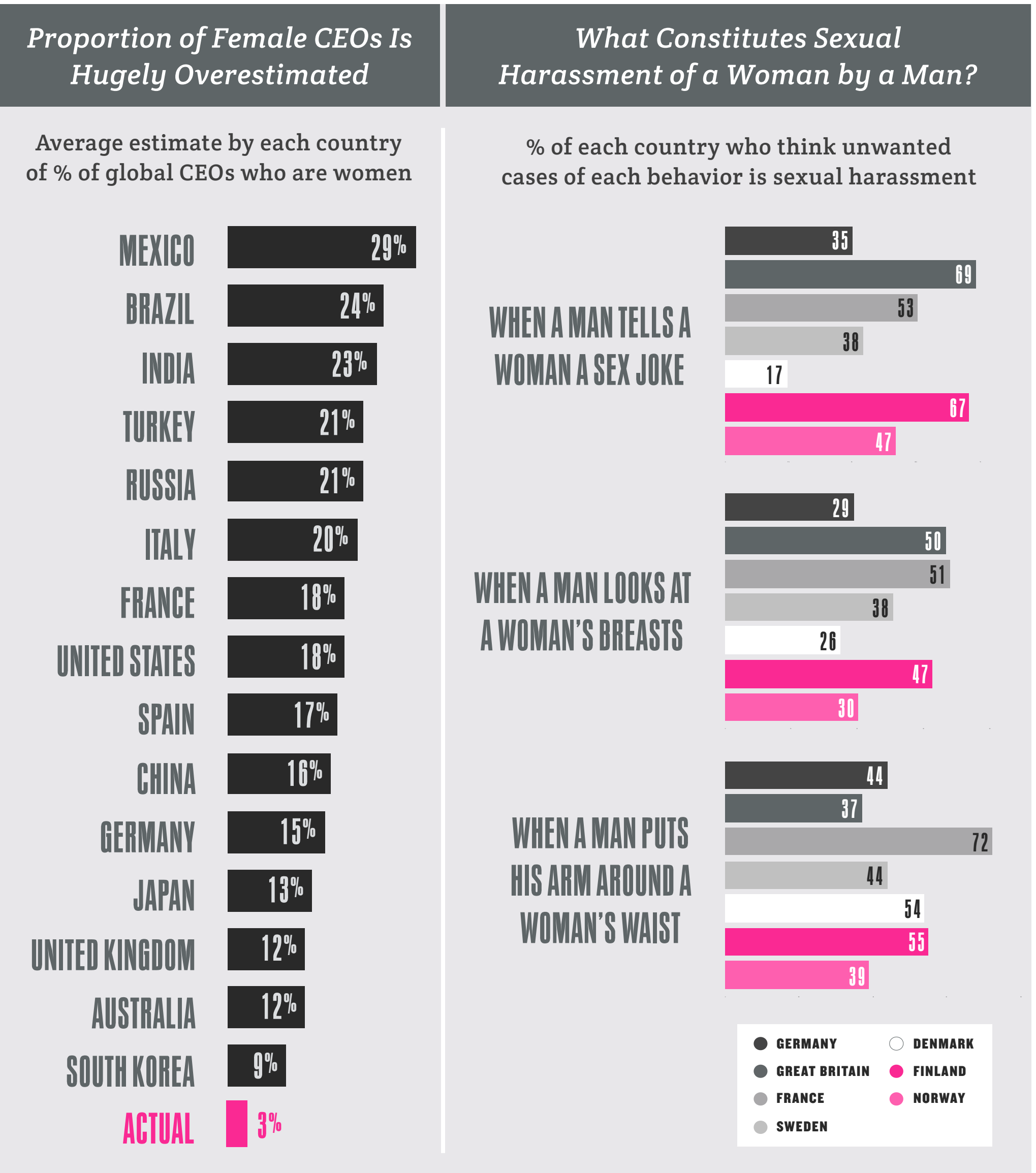
Studies generally suggest that, year after year, less than 60 percent of web traffic is human — and in some years, more than half of all web traffic consists of bots and users hired to create fraudulent clickstreams.

—New York Magazine

Figure 5.0

WHAT IS "REALITY?" DEPENDS ON WHO YOU ASK

In a deeply polarized world, highly motivated groups with contrasting perspectives and agendas abound — leading to a massive gulf in the interpretation of basic aspects of society, business and politics.

Proportion of Female CEOs Is Hugely Overestimated

Average estimate by each country of % of global CEOs who are women

MEXICO	29%
BRAZIL	24%
INDIA	23%
TURKEY	21%
RUSSIA	21%
ITALY	20%
FRANCE	18%
UNITED STATES	18%
SPAIN	17%
CHINA	16%
GERMANY	15%
JAPAN	13%
UNITED KINGDOM	12%
AUSTRALIA	12%
SOUTH KOREA	9%
ACTUAL	3%

What Constitutes Sexual Harassment of a Woman by a Man?

% of each country who think unwanted cases of each behavior is sexual harassment

WHEN A MAN TELLS A WOMAN A SEX JOKE

Germany	35
Great Britain	69
France	53
Sweden	38
Denmark	17
Finland	67
Norway	47

WHEN A MAN LOOKS AT A WOMAN'S BREASTS

Germany	29
Great Britain	50
France	51
Sweden	38
Denmark	26
Finland	47
Norway	30

WHEN A MAN PUTS HIS ARM AROUND A WOMAN'S WAIST

Germany	44
Great Britain	37
France	72
Sweden	44
Denmark	54
Finland	55
Norway	39

GERMANY   DENMARK
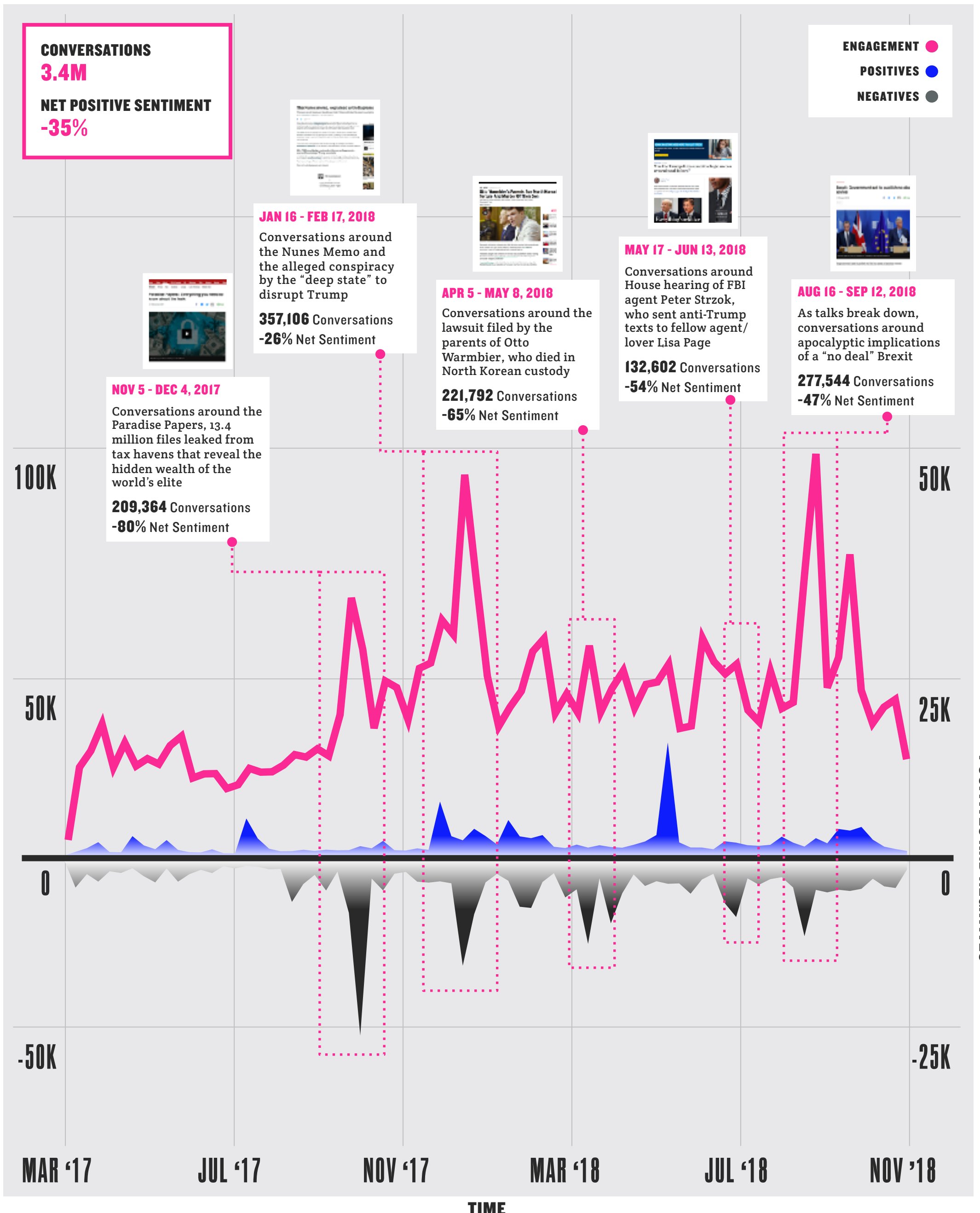GREAT BRITAIN   FINLAND
FRANCE   NORWAY
SWEDEN

Sources: Statista; YouGov

Figure 6.0

THE YEAR IN NEGOTIATED REALITY

What are people saying?
Here are the topics that triggered some of the most energetic and polarizing conversations in 2018.

CONVERSATIONS
3.4M

NET POSITIVE SENTIMENT
-35%

ENGAGEMENT ●
POSITIVES ●
NEGATIVES ●

JAN 16 - FEB 17, 2018
Conversations around the Nunes Memo and the alleged conspiracy by the "deep state" to disrupt Trump

357,106 Conversations
-26% Net Sentiment

APR 5 - MAY 8, 2018
Conversations around the lawsuit filed by the parents of Otto Warmbier, who died in North Korean custody

221,792 Conversations
-65% Net Sentiment

MAY 17 - JUN 13, 2018
Conversations around House hearing of FBI agent Peter Strzok, who sent anti-Trump texts to fellow agent/ lover Lisa Page

132,602 Conversations
-54% Net Sentiment

AUG 16 - SEP 12, 2018
As talks break down, conversations around apocalyptic implications of a "no deal" Brexit

277,544 Conversations
-47% Net Sentiment

NOV 5 - DEC 4, 2017
Conversations around the Paradise Papers, 13.4 million files leaked from tax havens that reveal the hidden wealth of the world's elite

209,364 Conversations
-80% Net Sentiment

ENGAGEMENT

POSITIVES AND NEGATIVES

100K — 50K
50K — 25K
0 — 0
-50K — -25K

MAR '17   JUL '17   NOV '17   MAR '18   JUL '18   NOV '18

TIME

Source: sparks & honey, Q™

SOCIAL VERBATIMS:
NEGOTIATED REALITY

What are people talking about in relation to Negotiated Reality?
They joked about how contrasting cultural lenses produce different conclusions; they raised issues about the inherent falsehood of social media personas; they candidly discussed the masks we wear in public, and asked (or demanded) that others accept the existence of multiple, equally valid truths.

SNARK ABOUT PERCEPTUAL DIVERSITY IN RACIAL IDENTITY

@Deb__ino   March 20, 2018

Damn we got Zaytoven and Beethoven

> **Mr.Knowledge13™** @True_kwu
> Ludwig Van Beethoven was so called Black. The classical composer's mother was a Moor. Even though paintings of the composer depict him as very Caucasian, his death mask highlights his African features.

MUSINGS ABOUT THE CURATED REALITY OF DIGITAL MEDIA

@Miss___fit   November 12, 2017

Im not me

As seen here on instagram I have talked about this before in earlier post's

What you see from people's life on here is just a fraction of who they really are

Nowadays people seem to be obsessed showing off their lives on social media, so the entire world will know they live a perfect life, sometimes I wonder if people arrange meet ups and get together with friends, not because they have missed them, but because they want to take pictures to show the world they are having such a good time with friends

The "brag" culture has made us so obsessed in narrating our lives online, that we sometimes h=forget how to enjoy

@nand__ial   October 31, 2018

Es dicho que solo los ojos de ellos llevan la verdad y solo ellos revelaran la verdadera historia.

It is said that only their eyes have the truth and only they will reveal the real story.

CRYPTIC POSTS ABOUT TRUTH AND REVELATION

@Mr__an   December 13, 2018

My reality is not your reality, so stop trying to tell me what's real.

DEFIANCE ABOUT THE RELATIVE NATURE OF REALITY

@Conn__ion   December 8, 2018

If your kid, or anyone else, is doing something nice for a disabled person - DO NOT FILM OR TAKE A PICTURE IF YOU DO NOT GET THE CONSENT OF THE DISABLED PERSON. In fact, ask the disabled person if they want/need assistance before you help.

Thank you for coming to my TED talk.

POINTING OUT THE FLAWS IN CAMERA CULTURE

Sources: Twitter

CULTURAL SIGNALS:
NEGOTIATED REALITY

**How is culture responding to the Negotiated Reality trend?
By finding new ways to enforce conventional norms and standards — and by creating tools that allow reality negotiation to be conducted transparently and documented.**

LEGALFLING IS A BLOCKCHAIN APP FOR SEEKING CONSENT BEFORE SEX

The Dutch app LegalFling isn't the first-ever consent app, but it is the first that attempts to secure "sexual contracts" with blockchain tech. The app has features like options to set boundaries and use them in a long-term relationship, and to send a cease-and-desist letter with a single tap. But critics note that it doesn't allow for continuous reassessment — making it insufficient for real consent.

CHINESE STARS FLOCK TO PAY TAXES AFTER AN EXAMPLE IS MADE OF FAN BINGBING

Fan Bingbing's mysterious disappearance last year after being accused of hiding a portion of her income from taxation has seemingly frightened an array of other top Chinese film and TV stars and their entertainment companies to voluntarily pay an additional $1.7 billion (RMB11.7 billion) in taxes. The figure was announced late Tuesday by China's State Tax Administration. As of October of last year, those who stepped forward to pay more post-2016 taxes were given an amnesty from penalties for tax evasion, the tax administration said.
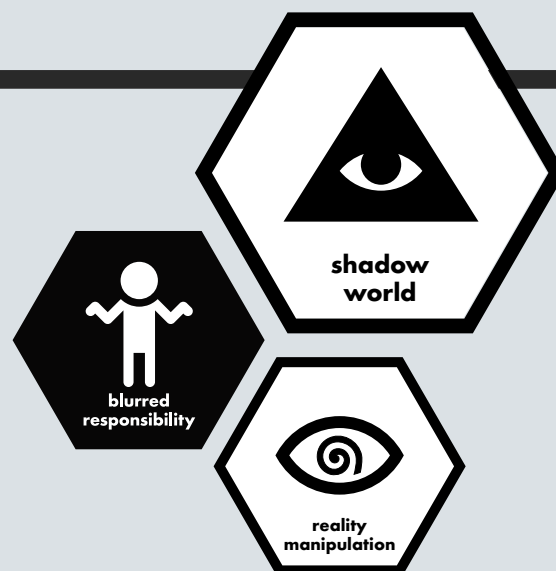

GOOP PAYS $145,000 IN SETTLEMENT OVER VAGINAL EGG CLAIMS

Gwyneth Paltrow's hipster wellness empire has lost a battle over false advertising claims. The lawsuit against Goop was brought by Santa Clara County District Attorney Jeff Rosen and nine other state prosecutors, who stated its medical claims were "not supported by competent and reliable science." Among Goop's claims: Inserting its $55 egg-shaped stones into one's vagina would help regulate menstrual cycles, prevent uterine prolapse and increase bladder control.

Sources: Grub Street; LegalFling; The Cut

ACCEPTED DECEPTION

Casual — occasionally cynical — acceptance of untruths as the norm

shadow world

blurred responsibility

reality manipulation

Misinformation threatens and undermines the cornerstone of human discourse which is the credibility of fact — it impacts information economics and human behavior. We want to trust, but we are living in a world where we don't know what information to trust.

Ping Fu, co-founder of Geomagic
sparks & honey Advisory Board member

DEFINING
ACCEPTED DECEPTION

A certain amount of falsehood is now assumed to be a part of every statement, relationship and experience by default.

Accepted Deception is the acceptance of a level of normative fakeness that may include falsehoods, untruths or murky speculation. Fake is the new normal, or so it seems in our world of Accepted Deception.

There's always been a pervasive level of unapologetic, baked-in falsehood in how we construct our worlds and communicate with one another. Politeness is anchored in a bed of genteel lies. The cosmetics industry is dependent on the notion that the eyes can be fooled, or at least coyly distracted. Where would marketers be without the ability to highlight and obscure key aspects of their products?

But now, technologies exist that allow our faces and images to be radically manipulated in real time, and the pillars of our society — from government to faith-based organizations to the muckrakers of media — are being framed as purveyors of falsehood. While trust in these institutions has degraded as a result, it has also led to a kind of fatalism around the concept of truth: an assumption that *everything* is a little bit fake. Or a lot.

This isn't always a negative thing. The suspension of disbelief can generate moments of playful absurdism, or allow us to fill emotional needs we're not quite ready to commit to IRL (such as turning to a temporary digital companion instead of a human one). But in the longer run, there are concern that the lazy acceptance of falsehoods obscures the bigger truths, like concerns around the need for vaccinations, the actuality of climate change or the breakdown of democratic values and process.

Accepted Deception has a tendency to aggregate those with similar mindsets, such as 4chan trolls, Moon Truthers or conspiracy theory enthusiasts like QAnon. Studies have shown that even faced with concrete evidence of the opposite, those whose opinions are based on firm beliefs in falsehood remain unswayed. As such, Accepted Deception is causing the gradual erosion of the very notion of universal truths — mathematics, for example, or that the Earth is round.

Accepted Deception is the acceptance of a level of normative fakeness that may include falsehoods, untruths or murky speculation.

For brands, the short term opportunity in the resigned acceptance of falsehood is outweighed by the danger that consumers will grow to embrace the corollary.

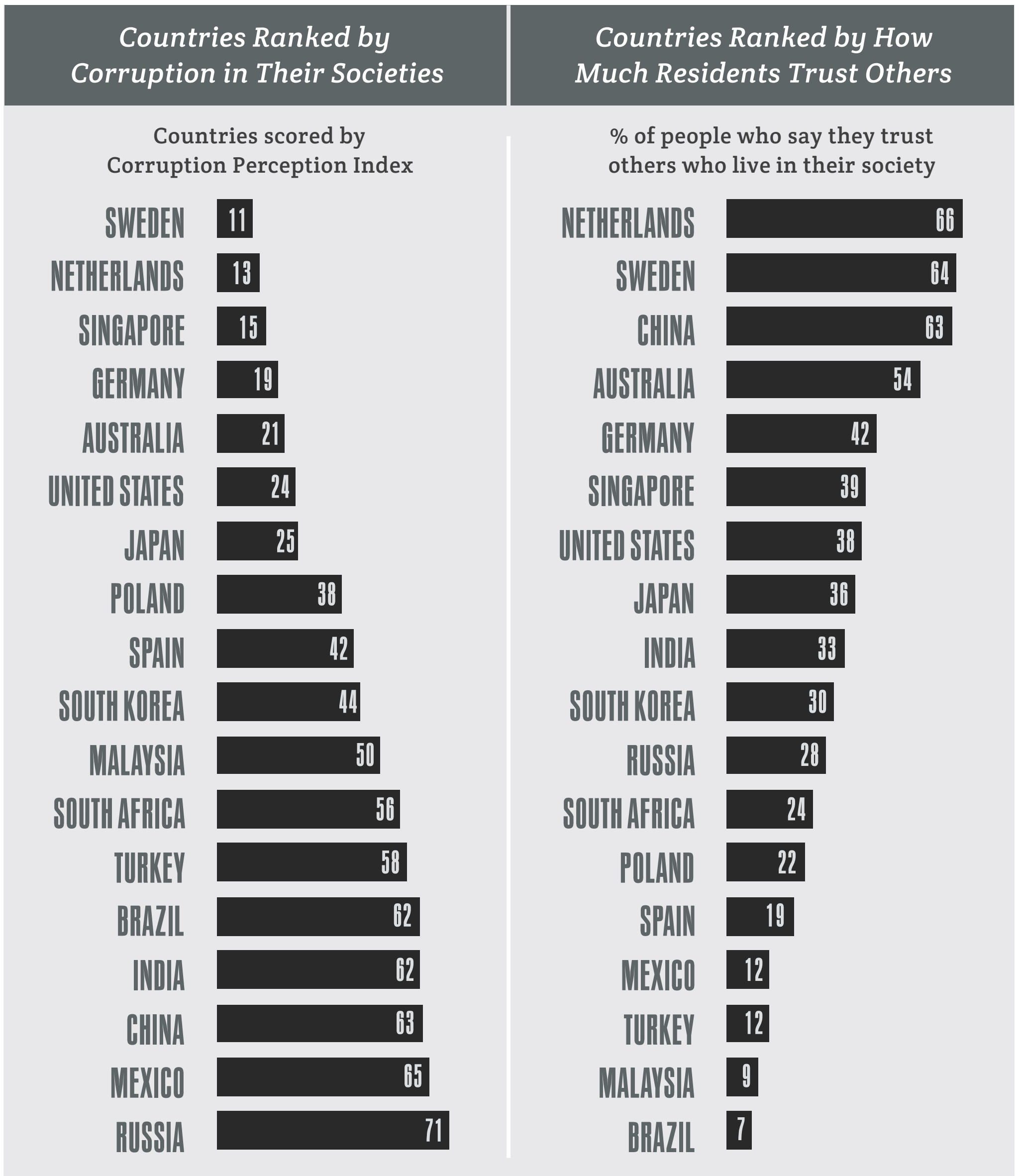If nothing is to be believed, we will believe in nothing.
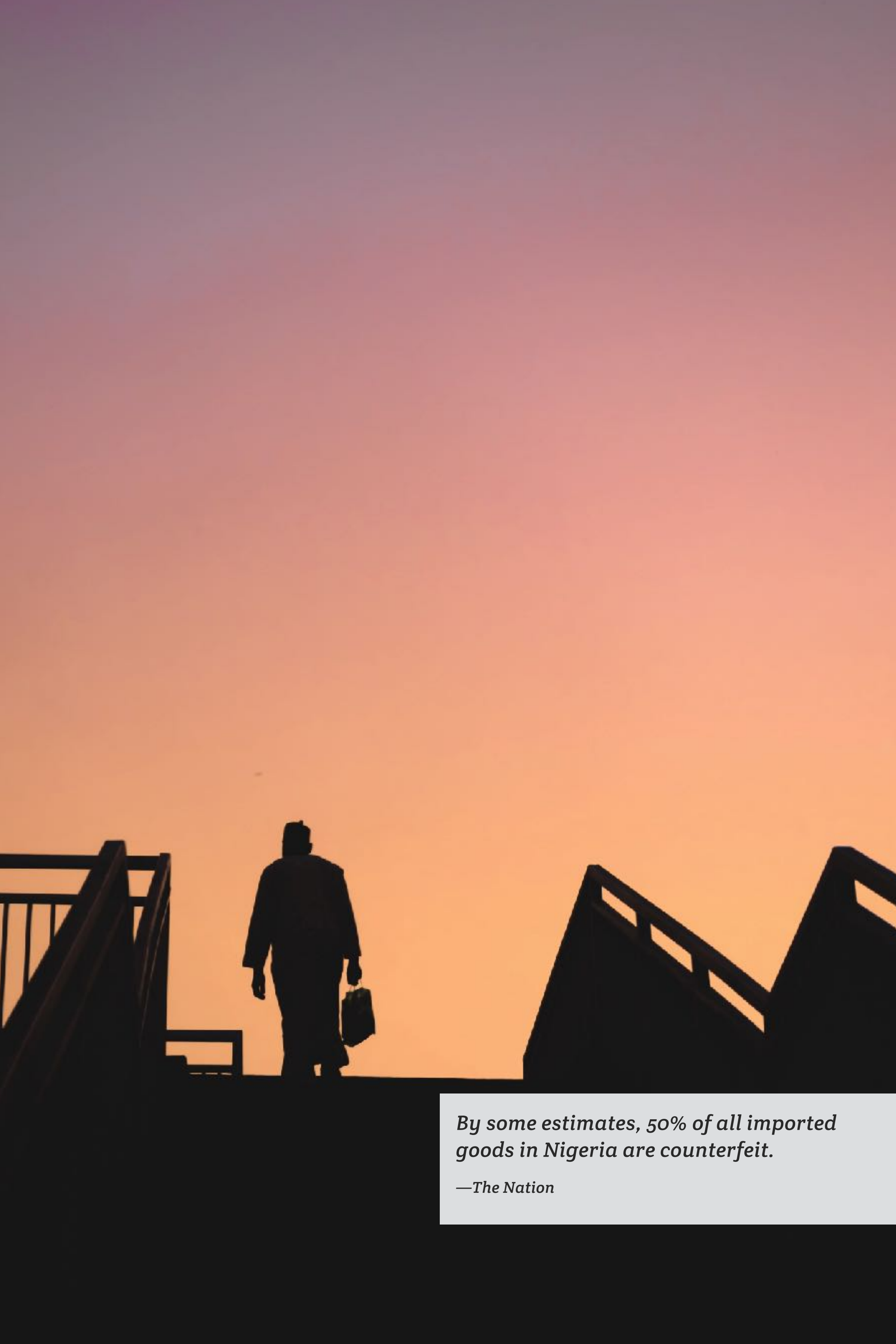
By some estimates, 50% of all imported
goods in Nigeria are counterfeit.

—*The Nation*

Figure 7.0

ENDEMIC CORRUPTION CREATES ENDEMIC DISTRUST

Markets where corruption is seen as part of everyday life generally create cultures where distrust of others is higher. Exceptions: China and Russia, whose authoritarian societies seem to push people to rely on circles of peer-to-peer trust.
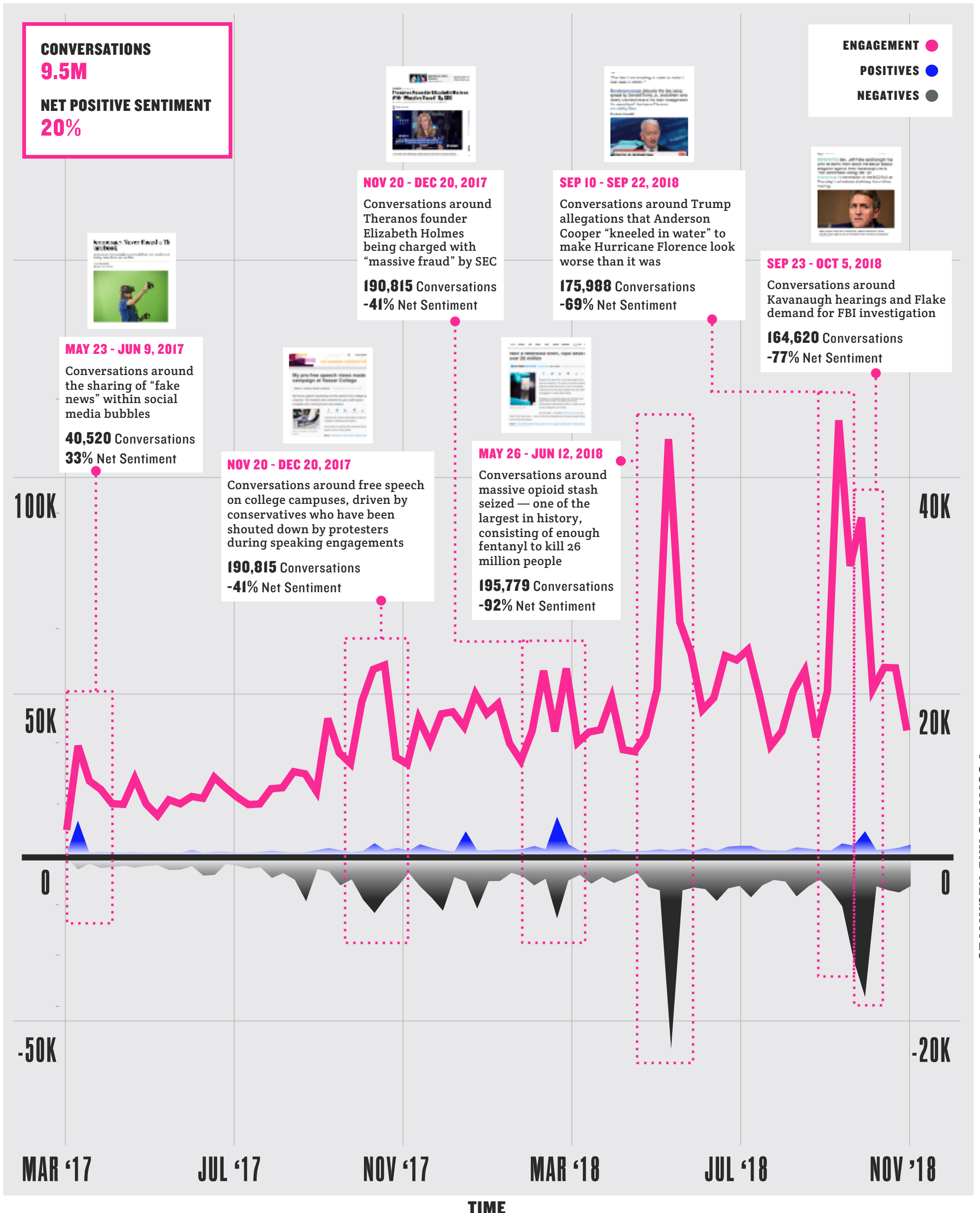
Countries Ranked by Corruption in Their Societies	*Countries Ranked by How Much Residents Trust Others*
Countries scored by Corruption Perception Index	% of people who say they trust others who live in their society

Corruption Perception Index		Trust Others	
SWEDEN	11	NETHERLANDS	66
NETHERLANDS	13	SWEDEN	64
SINGAPORE	15	CHINA	63
GERMANY	19	AUSTRALIA	54
AUSTRALIA	21	GERMANY	42
UNITED STATES	24	SINGAPORE	39
JAPAN	25	UNITED STATES	38
POLAND	38	JAPAN	36
SPAIN	42	INDIA	33
SOUTH KOREA	44	SOUTH KOREA	30
MALAYSIA	50	RUSSIA	28
SOUTH AFRICA	56	SOUTH AFRICA	24
TURKEY	58	POLAND	22
BRAZIL	62	SPAIN	19
INDIA	62	MEXICO	12
CHINA	63	TURKEY	12
MEXICO	65	MALAYSIA	9
RUSSIA	71	BRAZIL	7

Source: Transparency International; World Values Survey

Figure 8.o

THE YEAR IN ACCEPTED DECEPTION

What are people saying?
Here are the topics that triggered some of the most energetic and polarizing conversations in 2018.

CONVERSATIONS
9.5M

NET POSITIVE SENTIMENT
20%

ENGAGEMENT ●

POSITIVES ●

NEGATIVES ●

NOV 20 - DEC 20, 2017
Conversations around Theranos founder Elizabeth Holmes being charged with "massive fraud" by SEC

190,815 Conversations
-41% Net Sentiment

SEP 10 - SEP 22, 2018
Conversations around Trump allegations that Anderson Cooper "kneeled in water" to make Hurricane Florence look worse than it was

175,988 Conversations
-69% Net Sentiment

SEP 23 - OCT 5, 2018
Conversations around Kavanaugh hearings and Flake demand for FBI investigation

164,620 Conversations
-77% Net Sentiment

MAY 23 - JUN 9, 2017
Conversations around the sharing of "fake news" within social media bubbles

40,520 Conversations
33% Net Sentiment

NOV 20 - DEC 20, 2017
Conversations around free speech on college campuses, driven by conservatives who have been shouted down by protesters during speaking engagements

190,815 Conversations
-41% Net Sentiment

MAY 26 - JUN 12, 2018
Conversations around massive opioid stash seized — one of the largest in history, consisting of enough fentanyl to kill 26 million people

195,779 Conversations
-92% Net Sentiment

ENGAGEMENT

POSITIVES AND NEGATIVES

100K — 40K

50K — 20K

0 — 0

-50K — -20K

MAR '17   JUL '17   NOV '17   MAR '18   JUL '18   NOV '18

TIME

Source: sparks & honey, Q™

SOCIAL VERBATIMS:
ACCEPTED DECEPTION

What are people talking about in relation to Accepted Deception?
Fakeness is deeply embedded in their lifestyles — in media, in government and in social behavior. They also reference the disconnect between what we believe to be true and what's "actually going on," often with a deep undertone of conspiracy.

CALLING OUT FAKERY ON SOCIAL MEDIA

@Loz__l   December 1, 2018

Half the people on my snap are so fake lol but views

FATALISM ABOUT THE NATURE OF TRUTH

@darr___r   December 8, 2018

Everything is fake now. This probably isn't even real.

Thank u, next.

POINTING OUT THE FLAWS IN OPTIMISTIC PREDICTIONS

@nerd___e   April 8, 2018

I want to believe all the futuristic stuff about the internet of things and responsive tech and self driving cars (actually I hate self driving cars) Then I think about how our electrical grid in the US is 50-80+years old and how we're one dead squirrel away from a blackout.

BEMOANING THE RISE OF CONSPIRACY CULTURE

@dan__73   December 3, 2018

Used to love that show but now blame it for Trump

...

Needs explanation, I realize. People, conspiracies, gvmt all crooked... somehow and everything a cover up. Ppl take for granted everything is lies. I blame Xfiles for popularizing.

Sorry. Your light hearted post didn't deserve

DECLARING LACK OF FAITH IN KEY INSTITUTIONS, LIKE THE MEDIA

@dreg___y   July 26, 2018

At this point, if I hear it or read it from mainstream media, I just assume it's a lie. Because 99% of the time if it's not an outright manufactured lie, then it's spun so frantically that it's dizzying.

@theW___z   December 6, 2018

At some point I'm sure the matrix simulation we live in just broke and now this is our world

JOKING ABOUT THE WORLD AS A SIMULATION

Sources: Twitter

CULTURAL SIGNALS:
ACCEPTED DECEPTION

How is culture responding to the Accepted Deception trend? By creating new metrics for falsehood; issuing public warnings; or, in some cases, by shrugging and moving on.
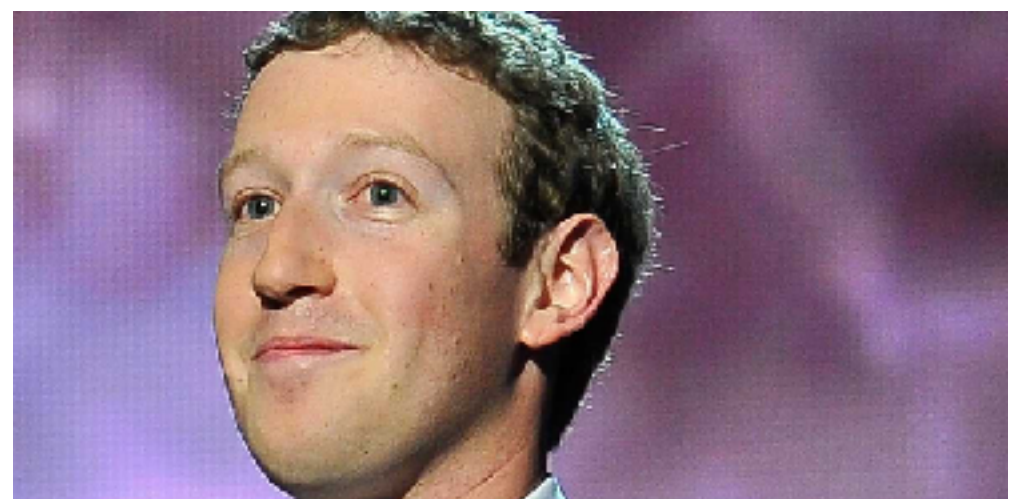

JORDAN PEELE (WITH AN ASSIST FROM BARACK OBAMA) CREATES A "DEEPFAKE" VIDEO TO WARN PEOPLE ABOUT FAKE NEWS

"You Won't Believe What Obama Says In This Video!" cleverly deepfakes an Obama address to the general public, with Peele as ventriloquist. Close listeners would probably realize it isn't Obama's actual voice, even if this Obama wasn't making such un-Obama like statements. However, the truly scary thing is that these videos can be made with the aim of fooling people who don't look or listen closely.

SUICIDES AND FLASH PROTESTS FOLLOW THE COLLAPSE OF CHINA'S PEER-TO-PEER LENDING INDUSTRY — AND ANALYSTS SAY THE WORST IS YET TO COME

Startups in China's loosely regulated "shadow banking" system have been imploding, with the number of companies operating in the industry falling from over two thousand — managing $180 billion in loans, capitalized by individuals in small amounts — to around a thousand by December of last year. The rise of the industry was driven by the smell of easy returns: Annualized rates on P2P loans were as high as 25%, providing steady income for consumers who have fled the volatile stock market. But as borrower defaults surged, companies have declared that they won't be able to make payouts, and increasingly been driven into bankruptcy. The result: pop-up riots and highly publicized acts of suicide by lenders who have lost their life savings.


FACEBOOK USERS WERE ACTUALLY UNFAZED BY THE BIG REVEAL ABOUT CAMBRIDGE ANALYTICA STEALING DATA

The Cambridge Analytica data debacle was billed as Facebook's biggest crisis, but it looks like it didn't even leave a scratch on the company. Facebook weathered the worst of the storm and usage actually increased, according to a client note from Goldman Sachs, citing ComScore figures.

Sources: Washington Post; Fast Company; TechCrunch

TRENDS 4 & 5
SPIRITUAL SELFISHNESS
+
VETTING AS A SERVICE
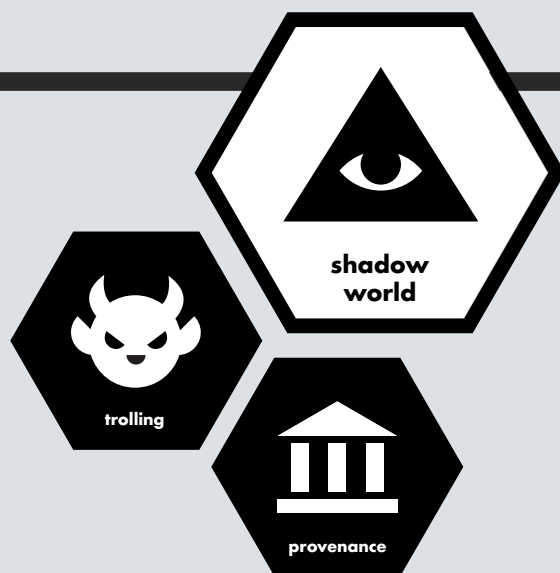
shadow world

trolling

provenance

Emerging Trends are just starting to gain traction; given the rapid pace of culture, they deserve eyeballs among brands, organizations and curious readers
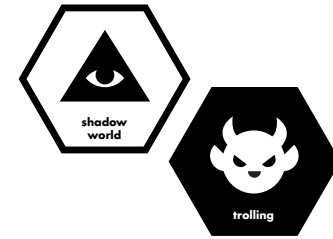
TREND 4

SPIRITUAL SELFISHNESS

As traditional institutions are found wanting, people seeking something to invest their faith in are experimenting with darker, more self-centered beliefs.

ELEMENTS OF CULTURE

shadow world

trolling

A growing cohort are turning to radical self-centeredness in the name of spiritual enlightenment or self-care. The core values that are underpinning the "softer side" of darkness are growing in public acceptance: free will, self-interest and hedonism. And the audience is listening; at the Golden Globes, Christian Bale thanked "Satan" for inspiration for playing his role in the movie "Vice." As trusted institutions and systems falter, the drive to focus on looking out for number one is tempting. Me-first spirituality seekers put themselves at the epicenter of the search for meaning — or seek to tap into faith on demand when their spiritual tanks are low on fuel.

SIGNALS

The underworld is elevated in Satanic Chic in the everyday

The self above all else because hell is other people

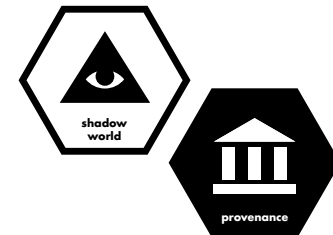*Priests are available on demand*

Meditating for success

TREND 5

VETTING AS A SERVICE

Tools designed to validate identity, conduct audits and confirm facts on demand are becoming increasingly common and popular.

ELEMENTS OF CULTURE

We are actively looking for support in deciding what and whom we should believe and trust. Whether it's a friend's promise, a news item, or a sale that sounds too good to be true people are searching for tools to ascertain what they can't with their own senses or gut instinct alone.

Given that online reality already requires constant navigation of an endless array of certification services (Are you human? Are you paying attention? Are you actually you?), it's not surprising that we now want to flip the script and use those services to double-check the state of our own realities.

SIGNALS

Pre-curated dating apps do the online work for you

Reddit "Am I the A**hole" is a catharsis for frustrated moral philosophers

Check if your data has been compromised on "Have I Been Pwned?"

Egosurfing or searching for yourself online

IMPLICATIONS FOR BUSINESS AND ORGANIZATIONS: SHADOW WORLD

1__

LEAN INTO THE FAMILIAR AND COMFORTABLE

The weirder the world feels, the more consumers seek out cultural anchors. Rebooted old standards and refreshed classics may play strongly with those wary of the creepy volatility surrounding them.

KEY CATEGORIES IMPACTED:

Media, consumer packaged goods, apparel, food & beverage

2__

EMBRACE PROCEDURAL TRANSPARENCY

Brands often interpret transparency as focused on outcomes (frequently telling people what they did only after they did it). Give consumers insight into their data and transactions in real time —as it happens.

KEY CATEGORIES IMPACTED:

Technology, e-commerce, healthcare, transportation

3__

ASSUME YOU SHOULDN'T MAKE ASSUMPTIONS

Many of the gaffes that have occurred to brands as a result of rising Shadow World trends occur because they have misread consumer expectations — especially after an unforced error. Don't assume: Ask and listen.

KEY CATEGORIES IMPACTED:

Banking, technology, retail, beauty

4__

### ACCEPT THAT THE BAR FOR TRUST IS FAR HIGHER NOW

Consumers are feeling fatalistic about falsehood — and while this buffers the impact of revelations of fakery, it also means their faith is much harder to earn. Expect trust to require more evidence and to be more fragile.

KEY CATEGORIES IMPACTED:

Media, banking, food & beverage, healthcare

CTRL-ALT-ESCAPE

Constant connectivity, stimuli-saturated environments and immersive digital platforms are challenging social conventions and forging new cultural norms

technomaladies
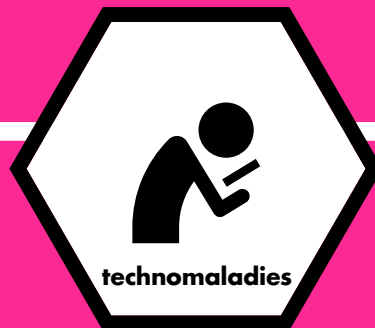
We live in a world where we can do anything with a few taps of a screen. Dozens of objects — phone, camera, flashlight, calendar, photo album, TV, ATM, shopping cart — have been reduced to a single, palm-size device. It's truly magical. But in so many simple ways, we are forgetting whom we are communicating with, which is to say people, and not screens.

Allison Goldberg
Co-creator and host of 2 Girls 1 Podcast

TECHNOLOGY GIVETH —
AND TAKETH AWAY

Devices, platforms and apps are enhancing our abilities more than previous generations could have ever dreamed. But, they are reshaping our capacity to focus, inundating us with stimuli and increasing our device-dependence just to function.

Technology serves as our limitless limbs, our imaginary friend, an angel on our shoulder — to the point where a majority of us now can't imagine living entirely untethered to our digital organs.

With the accelerated pace of technology, the speed of our individual and collective ability to keep up with it is struggling to keep up. Constant access to devices and digital platforms has radically changed what we expect to be capable of in any situation and altered how we think of ourselves and each other. Consequently, it is forcing us to modify our interpersonal and social behaviors to accommodate not just our human selves, but our inner cyborgs elements as well.

Is it polite to digitally stalk a blind date before meeting face to face? Should screens be banned from the dinner table, from meetings, classrooms or public events? Exactly when should we change a public social status to "in a relationship"? The answer is: It's complicated.

Technomaladies tracks the unintended consequences of the intertwining of tech into every aspect of our lives, and the constant feed of distraction and deluge of information that have come along with it.

Attention and a lack thereof is at the epicenter of Technomaladies. Our ability to focus is constantly challenged by alerts from devices and interruptions from people. We seek noise filters and safe spaces, often mediated by the very technologies that disturb us, to help us maintain progress and retain sanity. We're tracking this through the trend of "Tunneling."

The speed of information flow that forces our attention can make it harder and harder for us to keep up — to

process all of the data we are exposed to. The end result is a constant state of half-there-ness that we're tracking through a trend called "Semi-Presence."

To address that inability to process, we turn again to technology — letting it take over things we used to do for ourselves and in intimate fashion. That includes rational decision-making, emotional reaction, mental wellness and even our moral compass. The choices that were once driven by our heart, mind and gut are being redirected to technological partners — in the trend Thingsourcing.

Constant access to devices is forcing us to modify our behaviors to accommodate our human selves — and our cyborg elements as well.

The rules and behaviors around our relationships, from the romantic to the professional, are being changed in unpredictable ways, which we track in the It's Complicated trend. To cope, we may turn to Digital Minimalism, in a desire for self-limiting access to tools.

As technology makes us stronger and better, it's also gradually eroding our ability to trust our intuition, our memories and our individual capacities. Propelled by these Technomaladies, we are on the cusp of what might be called the end of "common sense," and its replacement with augmented ability.
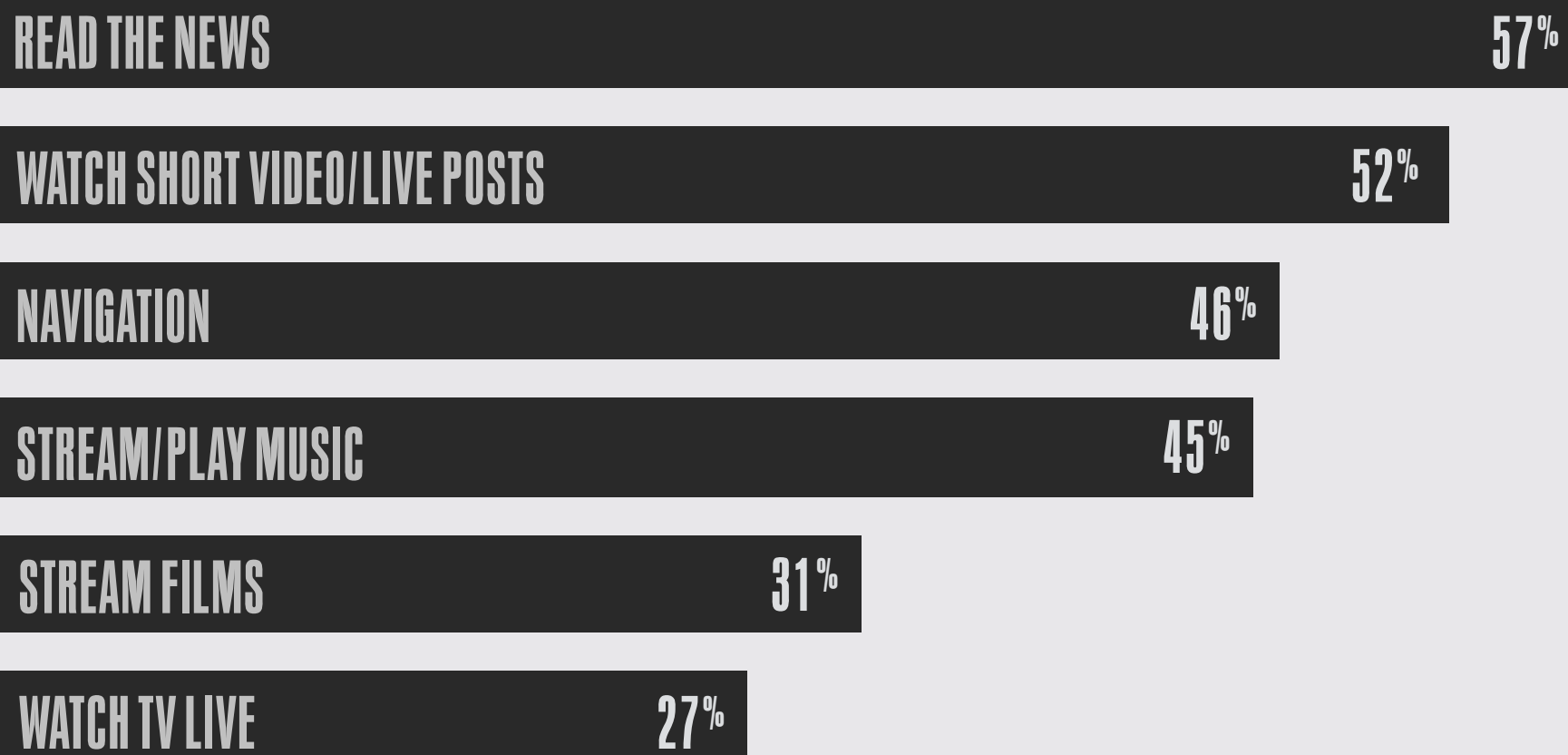
Figure 9.0

DEVICE SUPREMACY LEADS TO DEVICE DEPENDENCY

The first screens for more and more consumers, smartphones have gone from useful tool into inescapable life element: On average, consumers check their mobile phones 52 times a day.

We Do Everything on Our Phones...

% of consumers who say they use their phones to...

READ THE NEWS	57%
WATCH SHORT VIDEO/LIVE POSTS	52%
NAVIGATION	46%
STREAM/PLAY MUSIC	45%
STREAM FILMS	31%
WATCH TV LIVE	27%

...Which Makes Us Increasingly Reliant on Them

% of consumers who say they check their phones...

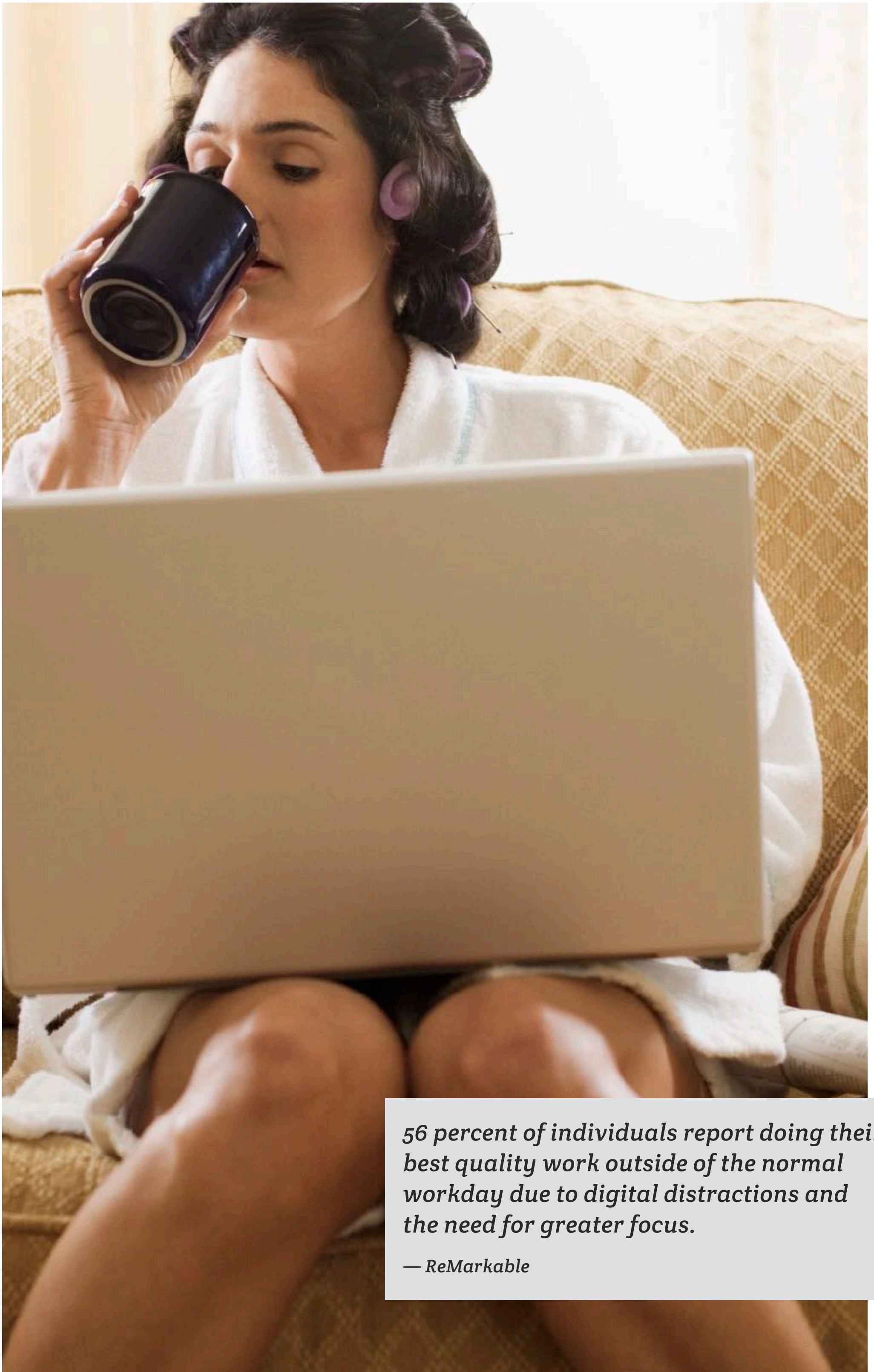| 89%	81%	92%	89%
First thing in the morning	Within an hour of going to sleep	While shopping	While watching TV

Source: Deloitte Global Mobile Consumer Survey

56 percent of individuals report doing their best quality work outside of the normal workday due to digital distractions and the need for greater focus.

— *ReMarkable*

2018 TIMELINE: TECHNOMALADIES

A snapshot of a year in Technomaladies: 2018 saw some of the most potent and polarizing cultural conversations around the themes of shrinking attention spans, processing overload and dependency on technology.

In 2018, we saw greater openness toward boundary-free identities and more attempts to accommodate the perspectives of an ever-wider range of people

An emergency inbound missile alert warning is accidentally sent out across the U.S. state of Hawaii at 8:07 HST, before being cleared as a false alarm. The event — caused by a clumsy user interface — leads to panic across a state inhabited by roughly 1.7 million people. (BBC)

January

Hangzhou Number 11 High School in east China debuts a pilot "smart classroom behavior management system" (or "smart eye"). The smart eye uses facial recognition technology to monitor students to see if they're engaged and focused. (Futurism)

March

Jeffrey Katzenberg and Meg Whitman raise $1 billion for their "New TV" startup, Quibi, short for Quick Bites — which will only produce and distribute narrative video under 10 minutes long. (Deadline)

July

French lawmakers rule that students under the age of 15 must leave their cellphones at home, or at least have them turned off during the school day. French high schools will be allowed to decide whether to implement the ban. (The Verge)

July

In 2018, we saw greater openness toward boundary-free identities and more attempts to accommodate the perspectives of an ever-wider range of people

In response to the FCC's December 2017 net neutrality ruling, Montana Governor Steve Bullock signs an executive order that bars any ISP with state contracts from charging more for faster delivery of websites to any customer in the state. (*NY Times*) (The Hill)

January

British Airways and U.S. Customs begin tests of facial scanning for UK-bound travelers leaving from Orlando, which claims it will reduce gate check-in time to three to five seconds per passenger. (NPR)

March

The Brookings Institution issues report claiming that information overload, constant multitasking and excessive screen usage is eroding kids' executive function. (Brookings)

March

A new trend among young people in Sweden: the implantation of microchips, which can function as contactless credit cards, key cards and even rail cards, into their bodies for instant access. Over 3,500 individuals have done so in the past year. (The Conversation)

June

2018 saw more choices that were once the province of heart, mind and gut being reassigned to technological partners — and more warnings as to the danger of doing so

Facebook patents technology that detects user emotions and automatically selects an animated selfie to depict that emotion on its platform. (Mashable)

June

Top AI researchers and engineers sign a pledge to never create autonomous killer robots, including Elon Musk and Alphabet's DeepMind co-founders Mustafa Suleyman, Demis Hassabis and Shane Legg. (Quartz)

July

Cybersecurity expert Bruce Schneier releases his new book, *Click Here to Kill Everybody,* a cautionary tale that begs citizens to disconnect from the Internet of Things or risk dystopian consequences for security and privacy.

August

Natural Cycles, an app that purports to tell women when it is safe for them to have sex without fear of getting pregnant, is charged with false advertising in the UK after dozens of women are found to have gotten pregnant while using the app. (*The Guardian*)

August

Twitter begins to test features indicating that will signal user presence — e.g., whether a user is online and open to interact with messages — on its platform. (Twitter)
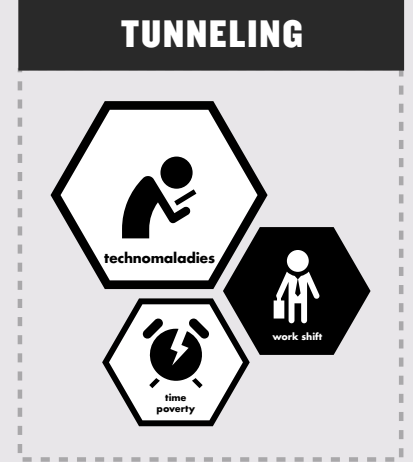
September

To capture short-attention span young readers, Penguin Random imprint Dutton introduces Penguin Minis — short books that are the size of a smartphone. (Penguin Random)

October

Homecoming, Sorry for Your Loss, Maniac, and *Kidding* herald the arrival of "snackable" 30-minute dramas to prestige TV (*NY Times*)

November

Coinbase, world's largest crypto trading platform, adds trading of the Basic Attention Token, a currency designed for users to indicate that they're paying attention to ads. (Toshi Times)
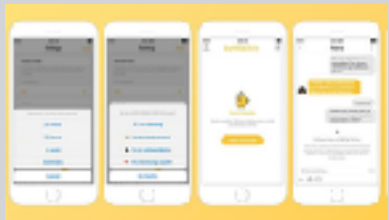
November

TUNNELING

Dating app Bumble introduces a "snooze" button that allows people to pause dating activity for 24 hours, 72 hours, a week or indefinitely. Users can set statuses like "traveling," "focusing on work," "on a digital detox" or "prioritizing myself." (The Verge)
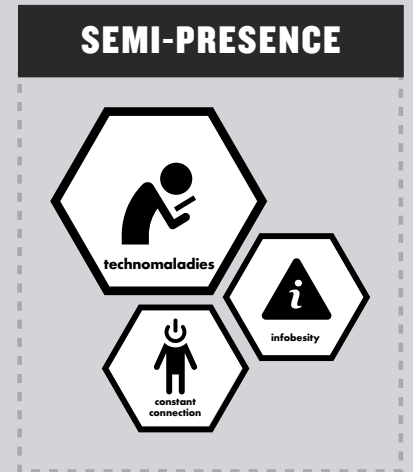
September

DARPA unveils new research in brain-computer interfaces that allows a pilot to control multiple drone aircraft at once, solely by thinking. (Defense One)

September

Indonesian airline Lion Air's Flight 610 crashes 13 minutes after takeoff, killing all 189 people aboard. One theory as to cause of accident: pilots overwhelmed by an excess of data. *(NY Times)*

October

Cofounder and CEO of Twilio Jeff Lawson unveils the company's new Avatar Chat app, which enables multiple Magic Leap One users to communicate with one another using avatars in augmented reality. (Magic Leap Reality News)

October

SEMI-PRESENCE

China's biggest search engine operator, Baidu, activates its AI operating system, DuerOS, on 141 million smart devices, making it the second most-installed AI after Google Assistant (which boasts 1 billion devices; Amazon's Alexa claims 100 million).

September

Startup Mindstrong Health unveils a smartphone app that collects measures of people's cognition and emotional health as indicated by how they use their phones. (*Technology Review*)

October

Amazon patents new technology for its Alexa AI that can automatically detect when you're sick and offer to sell you medicine.*(Telegraph)*

October

Apple's new Watch 4 with "fall detection" is credited with saving its first life. *(Forbes)*

October

THINGSOURCING
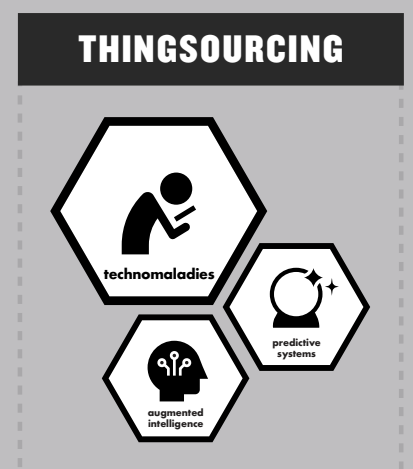
One in five adults aged 18 to 34 say they have checked their smartphones while in the course of having sex.

— Jumio Survey

TREND 6
TUNNELING

Driven to distraction, we're seeking new ways to focus

technomaladies

time poverty

work shift
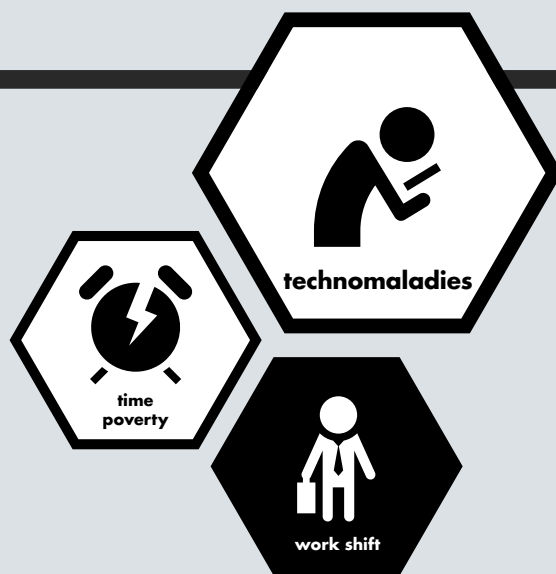
Our attention is being captured by devices rather than being voluntarily regulated. We are like a sailor without a rudder on the ocean — pushed and pulled by the digital stimuli to which we are exposed rather than by the intentional direction of our own mind.

Richard Davidson, neuroscientist at the University of Wisconsin Madison, founder and director of the Center for Healthy Minds

DEFINING
TUNNELING

We are imposing protective mechanisms — often through technology — to filter out the world at large, create personal safe spaces and allow for extreme focus.

Tunneling is an attempt to recover our attention span and agency from the chaos of a world that's too full of noise, both literal and figurative.

We're inundated with alerts, the feeds we're linked to never end and even the best aspects of our lives feel temporary and unstable. We turn to sources of comfort and retreat, using them as a temporary protective shield.

Technology distracts us — but we also are increasingly relying on it to help us put up tangible walls to shut out the world at large.

It's also a reaction to the growing sense of discord we face in becoming divorced from the things we used to rely on: real-world relationships, jobs with the

potential of lasting lifetimes, institutions worthy of our trust, celebrities that we could revere without fear, and even food we could consume without concern about its impact on our immediate or long-term health. We're inundated with warnings and alerts, the feeds we're linked to never end and even the best aspects of our lives feel all too temporary and unstable. And so we tunnel — turning to sources of comfort and means of retreat that form a temporary protective shield from the hostile aspects of the world and make us more productive in the process.

Consider innovations like wearables that receive notifications only from your top three chosen people; Google's new call-screening feature; or Panasonic's new "horse blinders" that block out your peripheral vision and cancel out ambient sound in open offices.

For consumers that feel overwhelmed by everything, tunneling creates a demilitarized zone of existence that gives them the power to ignore or actively dismiss things and people and phenomena around them, a means of control in a world that often seems out of it.
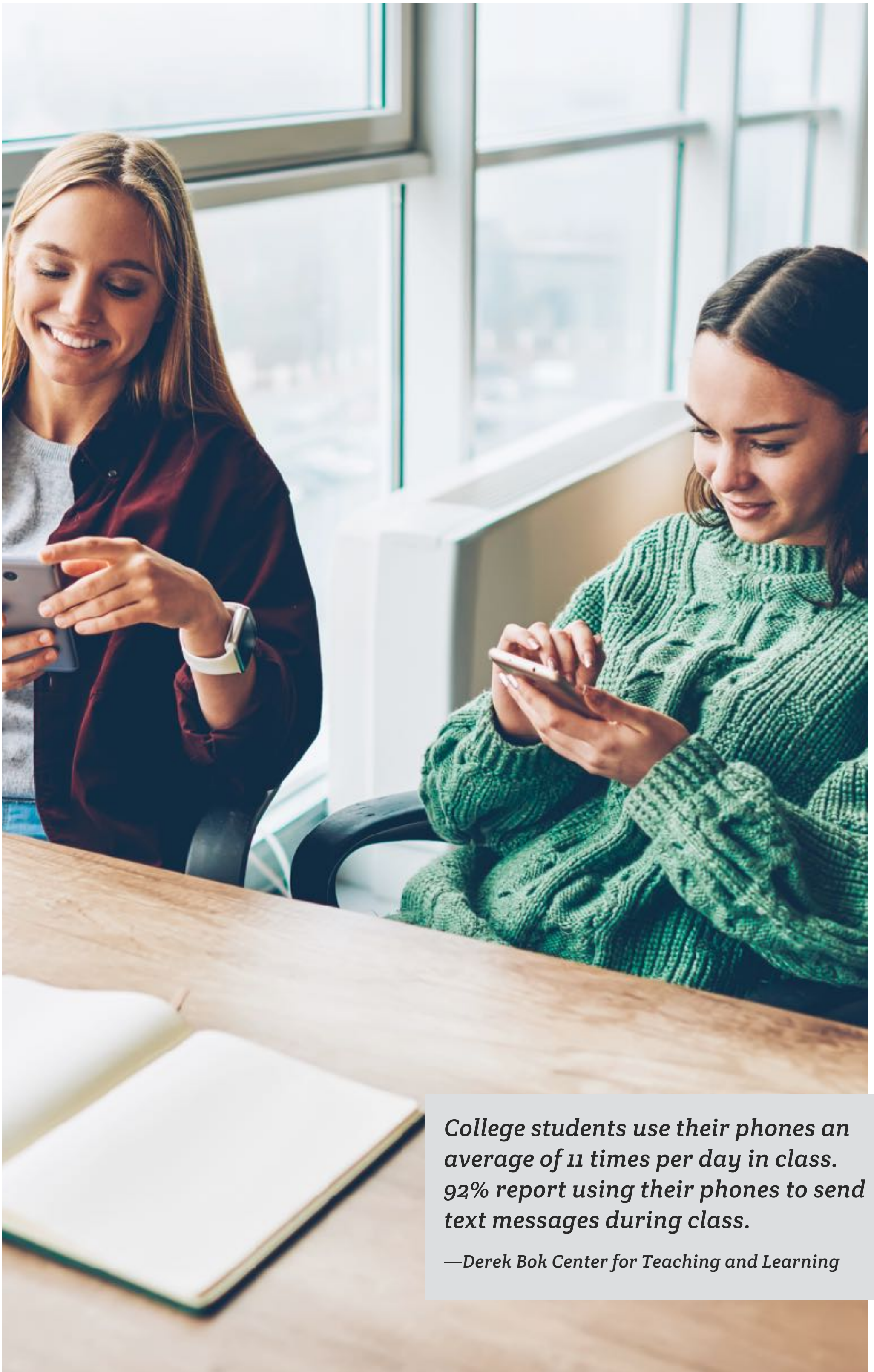
College students use their phones an average of 11 times per day in class. 92% report using their phones to send text messages during class.

—Derek Bok Center for Teaching and Learning

Figure 10.0

CONSUMERS USE THEIR PHONES TOO MUCH — BUT VARY ON WHAT THEY CONSIDER DISTRACTING

People of all ages say they use their phones too much (especially younger ones), but they also see them as tools to create positive distraction while engaged in tasks that are tedious, slow or annoying.

Many Smartphone Users Feel They're Overusing Their Phones

% who say they...

ADULTS
18-24 YEAR OLDS

	18-24	Adults
LOOK AT PHONE > 50 TIMES/DAY	23%	40%
USE PHONE TOO MUCH	45%	58%
TRY TO LIMIT USAGE	42%	47%
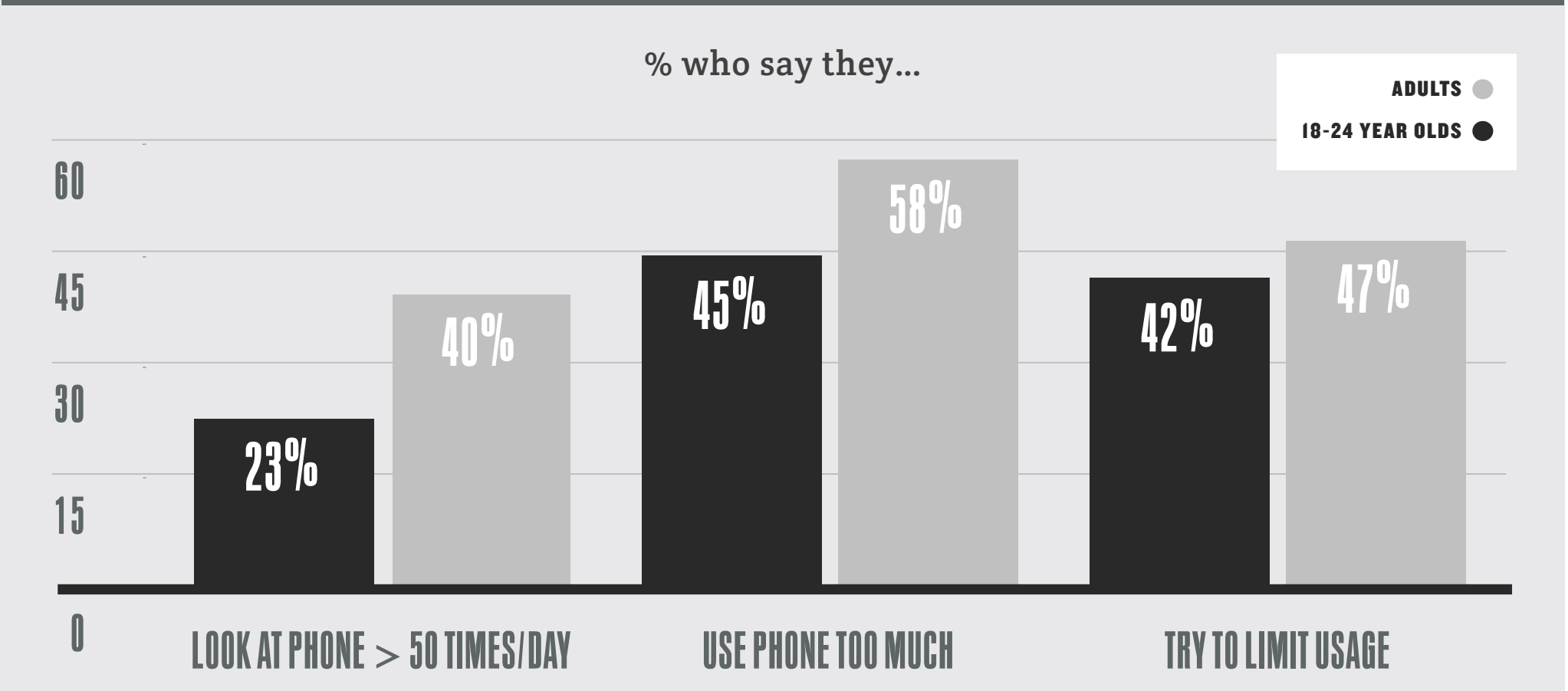
But They Don't Feel That Phone Use Is Always Distracting; Smartphones Are Often Seen as a Positive Distraction

% who say they use their smartphones...

	18-24	Adults
WHILE WATCHING TV/FILM	56%	68%
WHILE USING PUBLIC TRANSPORTATION	58%	73%
WHILE SHOPPING	51%	61%
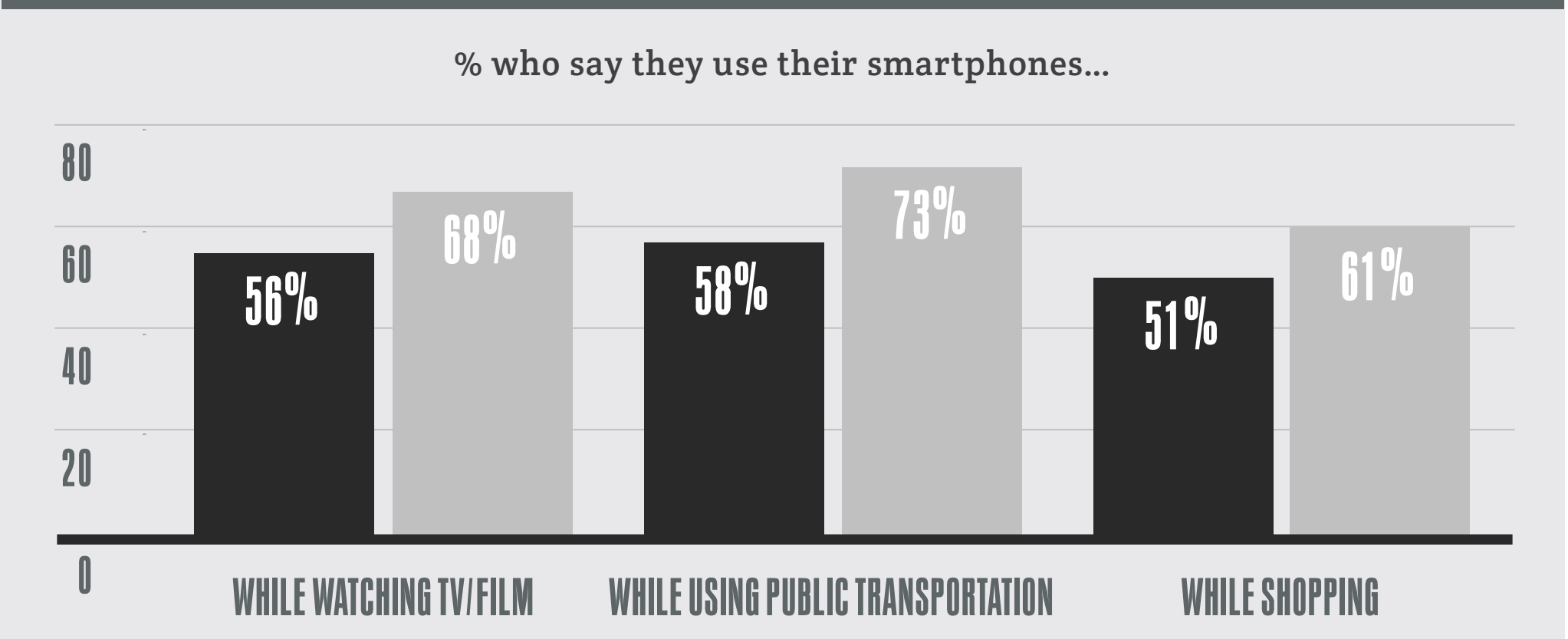
Source: Global Edition, Deloitte's Global Mobile Consumer Survey

Figure 11.0

THE YEAR IN TUNNELING

What are people saying?
Here are the topics that triggered some of the most energetic and polarizing conversations in 2018.

CONVERSATIONS
9.5M

NET POSITIVE SENTIMENT
20%

ENGAGEMENT ●
POSITIVES ●
NEGATIVES ●

FEB 1 - MAR 9, 2018
Conversations around K-pop group BTS's performance at #IHeartRadio, in which member Taehyung purposely took out his earpiece in order to hear the "fan army"

97,751 Conversations
36% Net Sentiment

SEP 23 - OCT 5, 2018
Conversations around spam email and how GDPR is destroying email marketing

126,597 Conversations
-23% Net Sentiment

SEP 23 - OCT 5, 2018
Conversations around unwanted genital images being sent to women over dating apps and social media

328,845 Conversations
-5% Net Sentiment

SEP 28 - OCT 15, 2017
Conversations around FEMA chief claiming to have "filtered out" the Mayor of San Juan's complaints about hurricane relief as "political noise"

67,933 Conversations
-21% Net Sentiment

MAY 10 - JUN 2, 2018
Conversations around tech and distraction, especially during driving

135,204 Conversations
13% Net Sentiment

NOV 7 - NOV 20, 2017
Conversations around open office woes

53,181 Conversations
-33% Net Sentiment

80K | 20K

40K | 10K

0 | 0

-40K | -10K

MAR '17   JUL '17   NOV '17   MAR '18   JUL '18   NOV '18

ENGAGEMENT

POSITIVES AND NEGATIVES

TIME

Source: sparks & honey, Q™

SOCIAL VERBATIMS:
TUNNELING

What are people discussing in relation to Tunneling?
They feel overwhelmed by the "noise" in the world; they share digital tools, apps and services that help them filter it out, fighting fire with fire; and they turn to memes and jokes about distraction and lack of focus.

CALLING OUT FAKERY ON SOCIAL MEDIA

@ron__c   December 14, 2018

Everything is overwhelming me. I can't focus. I feel drained and powerless. In need of peace of mind. Uncertainty is the worst. There's a storm in my mind and it's longing for the sun to dry the rain.

@aan__8   December 14, 2018

Whenever i have studio classes in university its so loud I cant focus on my work. So i put my headphones and put mono on repeat

It makes me feel like I'm in my own world and the music calms my mind and helps me focus more on my sheets and models
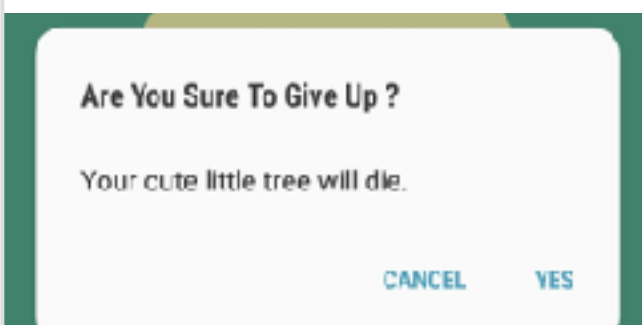

DISCUSSION OF METHODS TO FIND FOCUS

POINTING OUT THE FLAWS IN OPTIMISTIC PREDICTIONS

@dan__73   December 3, 2018

so I downloaded this app to help me focus and stay off my phone and basically you set a timer and it grows a tree and the tree dies when you use anything but this app and it's actually helpful cause I'm so sad when I fuck up and my tree dies

@closet__es   December 10, 2017

closet__es I can relate...

#thecreativeprocess #shortattentionspan #distracted #creativeinsanity

MEMES ABOUT PROCRAST-INATION

JOKES ABOUT DIGITAL DISTRACTION

@lopa__t   December 11, 2017

lopa__t via @shusaku1977 #distractionfree #xennial #tuesdaythoughts #beherenow

DECLARING LACK OF FAITH IN KEY INSTITUTIONS, LIKE THE MEDIA

@Wynt__l   June 26, 2018

(I bought a secret cell phone just for photography and reading so I wouldn't get distracted by notifications and texts)

Source: Twitter; Instagram

CULTURAL SIGNALS:
TUNNELING

How is culture responding to the Tunneling trend?
By developing products or services that offer even more powerful ways to filter out noise and eliminate distractions.

A VIDEO GAME OFFERED AN ACHIEVEMENT FOR NOT PLAYING IT FOR FIVE YEARS

There's only way to get the "Go Outside" achievement in the indie adventure game The Stanley Parable — and that's not to play it. If a player purchased The Stanley Parable on the day it launched on Steam, the very first day they could open the game in order to score this unique "badge" was October 17, 2018. Game creator Davey Wreden created the achievement in part as a prank and in part as a reminder to not allow games to distract you from life.

OPEN OFFICES HAVE DRIVEN A PANASONIC DESIGN INNOVATION TEAM TO MAKE HORSE BLINDERS FOR HUMANS

Open space offices are basically the worst. The startup-driven push to eliminate the world from the tyranny of the cubicle has spawned the creation of cubicles for our faces. Designed by Panasonic design studio Future Life Factory, Wear Space blinders obscure the wearer's peripheral vision, and sport noise-canceling headphones. The team launched the product on a crowdsourcing site and successfully raised nearly $150K to bring it to life.

TRAVELER, THE "ULTIMATE DISTRACTION-FREE WRITING TOOL," RAISES $600K ON INDIEGOGO

Calling itself the "Only Laptop Designed to Help You Focus," Traveler is a keyboard and e-ink contraption that is designed to be hyperportable, with a long-lasting battery and "no distracting apps," thus offering nothing that might distract a writer from completing their work.

Source: Mashable; Kotaku; Indiegogo

TREND 7
SEMI-PRESENCE

The state of never-ending processing
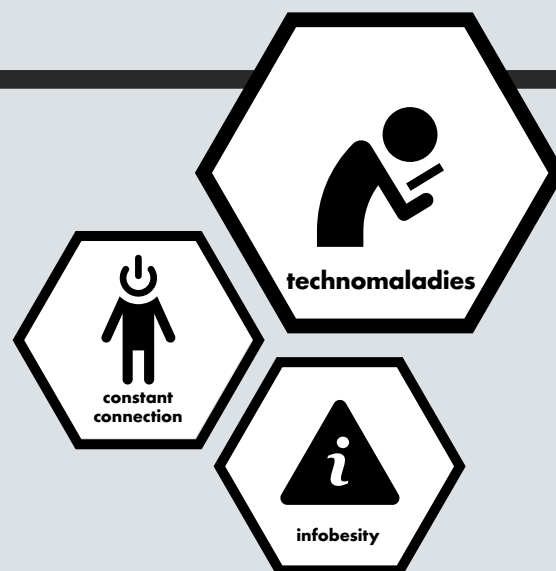
On mobile, presence isn't just expected — it's mandatory. So the three-dot "I'm typing" indicator has become a message itself — the equivalent of saying, 'Hold on, I'm responding."

"Bubbles Carry a Lot of Weight," The New York Times

DEFINING
SEMI-PRESENCE

Surrounded by stimuli, we are in a perpetual three-dot state — present, but "in the process of processing."

Consumers today exist in perpetual partial attention, hypertasking across platforms in a world that constantly asks whether they're ready for more. We are caught in a persistent "three-dot state," trapped in an endless flow of information processing, stuck before completion and transmission — leading those around us wonder if we are just kind of there, or *really* there.

This normalized condition of Semi-Presence means that we're eternally half-tuned in to everything and frozen in not-quite-complete status, unable to close the loop on people we message, media we consume, or the items left in our cart online. We are not quite zoned out — but we are not exactly zoned in either.

Semi-Presence is a reaction to the avalanche of data we now have to process from our surroundings, our feeds, our devices and the mobs, digital and in physical spaces, who seek our attention. Being busy has replaced being productive; our calendars and inboxes are full, but no one really knows where we are or what we're doing. In response, some of us consciously seek to decouple from our devices to obtain clarity, calmness and a return to true engagement in the present.

We're eternally half-tuned in to everything and frozen in not-quite-complete status, unable to close the loop.

Others rely on human or machine curation, or amp up the performance and power of their tools, or even surrender — declaring "bankruptcy" on messages and requests and telling the world they intend to start over with a clean slate.

For brands, this means that those rare occasions in which people are truly present and paying full attention are ever more precious. Note, the most powerful message there is might simply be silence.

Ask yourself, where else were you while reading this?

On average, Americans consume 34 gigabytes of content and encounter 100,000 written words from various sources every single day.

—*Quartz*

Figure 12.0

CONSUMERS ARE EXPOSED TO A CONSTANT FLOOD OF INFORMATION

Social and digital media have unleashed an improbable array of content on consumers, who are increasingly challenged in navigating the flow.

EVERY MINUTE OF THE DAY

YOUTUBE
Users Upload
72
Hours of New Video

EMAIL
Users Send
204,000,000
Messages

WECHAT
Users Send
25,000,000
Messages

GOOGLE
Receives over
4,000,000
Search Queries

WEIBO
Users Share
64,000
Posts

FACEBOOK
Users Share
2,460,000
Pieces of Content

TIKTOK
Users Upload
9,270
Videos

TINDER
Users Swipe
416,667
Times

YELP
Users Post
26,380
Reviews

WHATSAPP
Users Share
347,222
Photos

APPLE
Users Download
48,000
Apps

TWITTER
Users Tweet
277,000
Times

PANDORA
Users Listen to
61,141
Hours of Music

AMAZON
Makes
$83,000
In Online Sales

INSTAGRAM
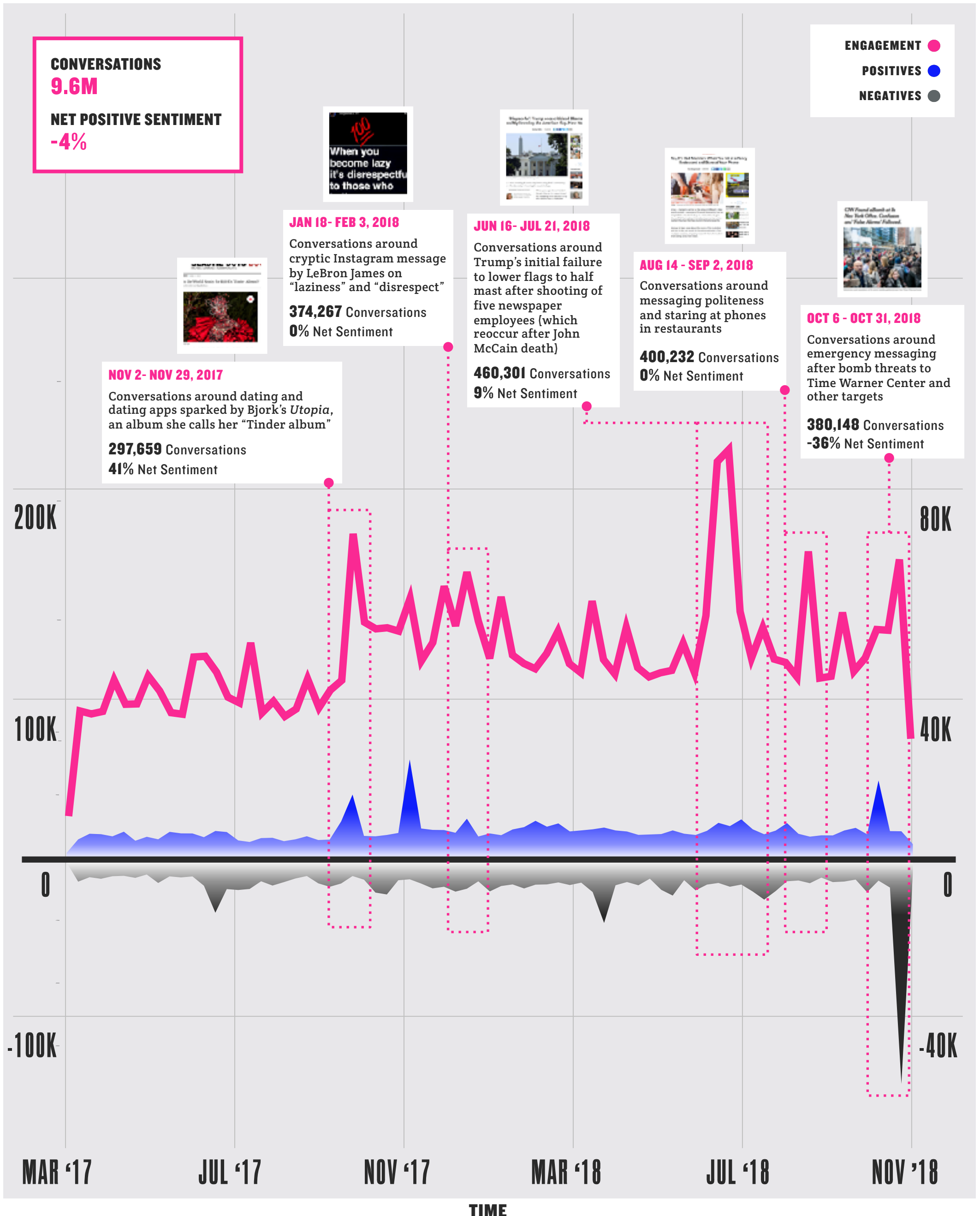Users Post
216,000
New Photos

Source: Domo, Tencent, Weibo, Tiktok

Figure 13.0

THE YEAR IN SEMI-PRESENCE

What are people saying?
Here are the topics that triggered some of the most energetic and polarizing conversations in 2018.

CONVERSATIONS
9.6M

NET POSITIVE SENTIMENT
-4%

ENGAGEMENT ●
POSITIVES ●
NEGATIVES ●

JAN 18- FEB 3, 2018
Conversations around cryptic Instagram message by LeBron James on "laziness" and "disrespect"

374,267 Conversations
0% Net Sentiment

JUN 16- JUL 21, 2018
Conversations around Trump's initial failure to lower flags to half mast after shooting of five newspaper employees (which reoccur after John McCain death)

460,301 Conversations
9% Net Sentiment

AUG 14 - SEP 2, 2018
Conversations around messaging politeness and staring at phones in restaurants

400,232 Conversations
0% Net Sentiment

OCT 6 - OCT 31, 2018
Conversations around emergency messaging after bomb threats to Time Warner Center and other targets

380,148 Conversations
-36% Net Sentiment

NOV 2- NOV 29, 2017
Conversations around dating and dating apps sparked by Bjork's *Utopia*, an album she calls her "Tinder album"

297,659 Conversations
41% Net Sentiment

200K | 80K

100K | 40K

0 | 0

-100K | -40K

MAR '17   JUL '17   NOV '17   MAR '18   JUL '18   NOV '18

ENGAGEMENT

POSITIVES AND NEGATIVES

TIME

Source: sparks & honey, Q™

SOCIAL VERBATIMS:
SEMI-PRESENCE

What are people discussing in relation to Semi-Presence? The inability to fully immerse and engage in conversations; the state of overstimulation and data overload; and their need to become more mindful and situated in the "now."

BEING OVER-SCHEDULED

@rom__s October 21, 2018

how are we expected to be fully engaged in everything when there are too many things going on all at once

MUSINGS ON THE FUTURE OF HUMAN/TECH CONVERGENCE
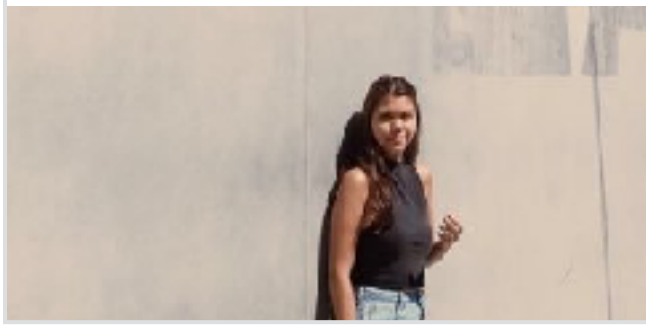
@sarb__l December 13, 2018

There but not there! This is powerful way to make us realize what we have become.Can we go back to no screen in our hands? I think we can, at least we can reduce screen times, as we develop better voice recognition and computer brain interfaces (kind of the way we talk to humans).

BY ~2025 WE WILL BE INTERACTING WITH MACHINES (INCLUDING PHONES) AS WE TALK TO HUMANS TODAY, THANKS TO IMPROVING COMPUTER VISION AND EVER EVOLVING VOICE RECOGNITION.

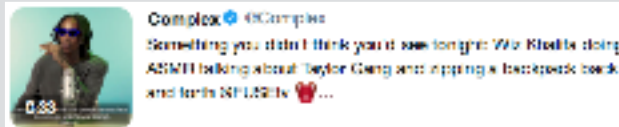HOW HUMANS CAN BE LESS DORKY (SU)

BEING OVER-STIMULATED

@_si__D July 3, 2018

You know that barely audible high-pitched squeal/groan that comes out when you're too overwhelmed by a particular stimulus to form or iterate anything resembling coherence?

BEMOANING INFORMATION OVERLOAD

@msr__c December 13, 2018

Am I the only one who gets overwhelmed with information and have to shut down often just to avoid knowing? To see through my eyes, like really see? …#informationoverload

Complex @Complex
Something you didn't think you'd see tonight: Wiz Khalifa doing ASMR talking about Taylor Gang and zipping a backpack back and forth SHHHH 🎒…

IMPATIENCE WITH THE "THREE DOT" WORLD

@amos__r June 4, 2018

When you text someone a yes or no question and then you see the three-dot typing bubble for five minutes

ADVICE ABOUT "BEING PRESENT"

@kami__a July 11, 2018

Mental and emotional flux occurs when we fail to live life one moment at a time. We are never fully present in any particular place. Mind and body learn to live separately and we sink into anxiety, forgetfulness and absent-mindedness. Learn to focus on your now. #BePresent #DoYou

Source: Twitter

CULTURAL SIGNALS:
SEMI-PRESENCE

How is culture responding to the Semi-Presence trend? By deliberately shutting out the rest of the world; enhancing conscious alertness; or safeguarding against the risks of not being all there.

MINDFULNESS DOMINATES APP DOWNLOADS IN 2018

In 2018, the U.S. meditation market hit $1.21 billion (up from $959 million in 2015) — driven in part by technology, as apps like Calm (Apple's App of the Year) and 10% Happier (Android's Best Self-Improvement App of 2018) seek to help users free themselves from social and informational overload and embrace "mindfulness." Over 37 million people have downloaded the Calm app — half in 2018 alone.


SILICON VALLEY INSIDERS ARE GOING ON "TALK FASTS" AND "SILENCE DIETS" TO RETHINK ATTENTION

What's a Silence Diet? A vow to not talk and to take a break from digital communications technologies for a set period of time. While it doesn't mean retreating from the world, it does mean retreating from the word — and it's supposed to refresh and provide perspective on how much information we deal with daily, says Phil Sanderson, a partner at IDG Ventures. Sanderson took a week off speaking in February, though his job is talking to Silicon Valley entrepreneurs and investors. He communicated in short notes on a whiteboard: "Not talking was frustrating for me, but communication became efficient and I listened."

"DISTRACTED WALKING" IS CREATING DANGER FOR CHINA'S "HEADS-DOWN" TRIBE

So ubiquitous in China are pedestrians glued to their phones, they've earned a nickname, the "heads-down tribe." The World Health Organization calls such behavior "distracted walking," and it is a growing concern in China, where pedestrian deaths make up a significant number of traffic-related fatalities.

Source: Quartz; Marketwatch; South China Morning Post

TREND 8
THINGSOURCING

Expanding human capacity by exporting functions to external devices and platforms

technomaladies

augmented intelligence

predictive systems
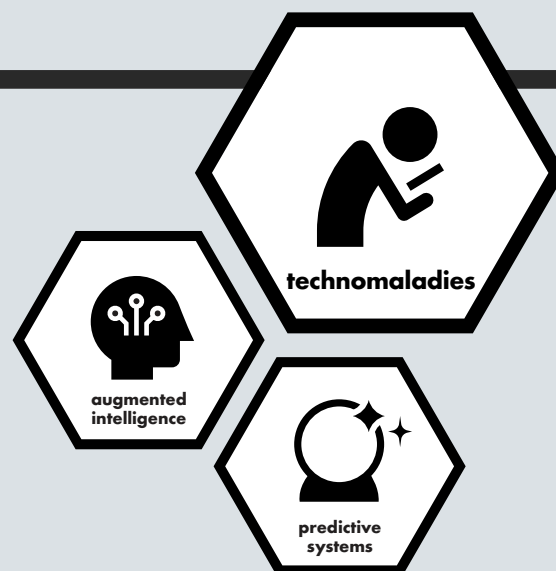
The technologies that shape our present perceptions of reality are not going to go away. Our life support systems on a planet of 7.5 billion people and rising depend on them. [But] we are not powerless, not without agency. We only have to think, and think again and keep thinking.

Our machines demand it.

"Rise of the machines: has technology evolved beyond our control?," James Bridle, The Guardian

DEFINING
THINGSOURCING

We depend on technology for ever-more-intimate needs — from relationship management to emotional support to providing a moral compass

Without the guidance of our mobile devices, many of us can't find the way around our hometowns, much less strange locations. But wayfinding is just one of the routine tasks we have exported to technology that we used to perform ourselves, through training, instinct, reflex or conventional wisdom.

What happens when we outsource ethical choices to AI, which will make decisions by cold calculation, rooted in data that's likely to be biased and skewed?

The looming fear associated with outsourcing jobs in the macro economy is that we will gradually lose the skills we send abroad and become fully dependent on foreign markets to do what used to be our own business. That concern is also present in the context of

Thingsourcing; will future generations become so digitally dependent that they can no longer function without devices and apps?

We're already beginning to trust technology more than ourselves — consider the many cases of people driving into lakes and walls because GPS has erroneously told them to make a hard left turn. But as technology moves from the outside world into our inner lives, we may lose more than just our sense of direction.

Some experts envision a future in which we may simply Google our brains — eliminating that nagging feeling of not being able to recall a specific memory. Will our ability to remember the past, make decisions in the present and plan for the future soon go the way of our ability to find our way home? What happens when we outsource ethical choices to AI, which will make decisions by cold calculation, rooted in data that's likely to be biased and skewed?

For brands, the future will mean deciding when to lean into our new cyborg reality, and knowing when to board the human premium bandwagon.
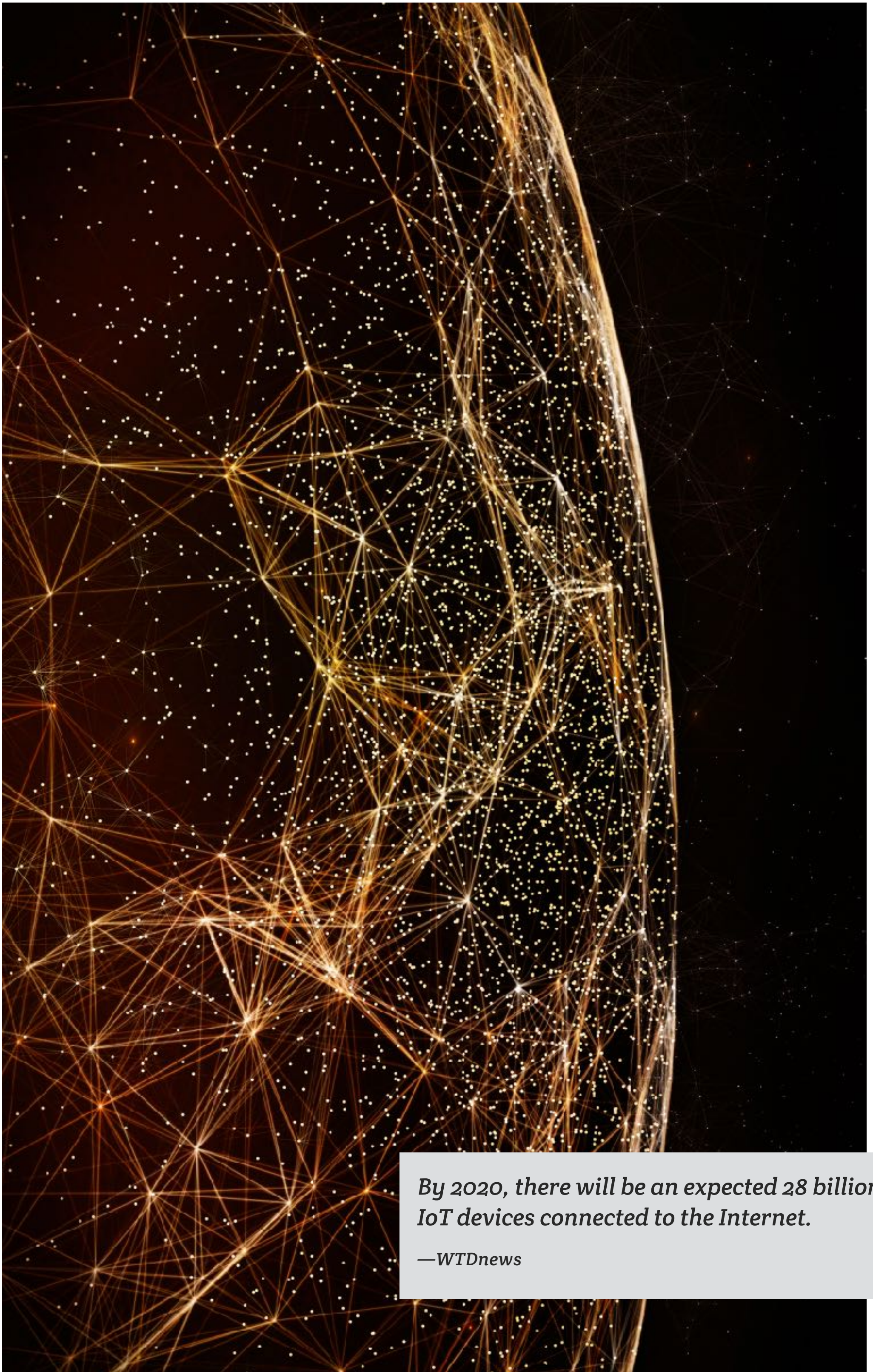
By 2020, there will be an expected 28 billion IoT devices connected to the Internet.
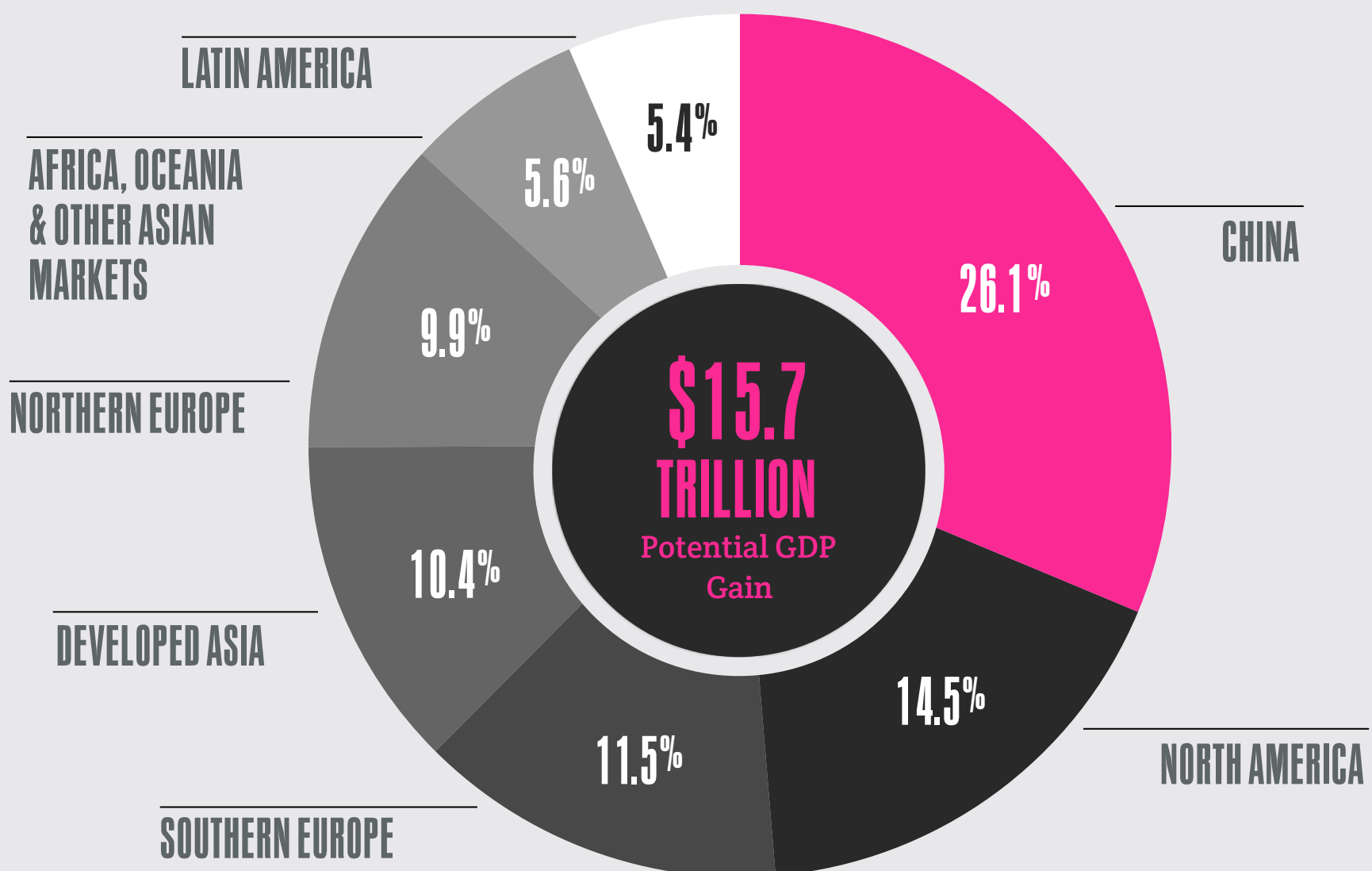
—WTDnews

Figure 14.0

AI IS BOOMING — AND HUMANS ARE WORRIED ABOUT FALLING BEHIND

AI is being embedded in our devices with the promise of huge productivity benefits. But what happens when machines are the gatekeepers of our needs? Will AI become vulnerable— or compete with humans for resources and opportunities?

China and North America Will See Biggest AI Gains by 2030

% of GDP growth due to artificial intelligence, by global region

LATIN AMERICA

AFRICA, OCEANIA & OTHER ASIAN MARKETS

NORTHERN EUROPE

DEVELOPED ASIA

SOUTHERN EUROPE

5.4%

5.6%

9.9%

10.4%

11.5%

14.5%

26.1%

CHINA

NORTH AMERICA

$15.7 TRILLION
Potential GDP Gain

Do the Following Scenarios Concern You?

% of global respondents who say the following scenarios worry them

85%
AI machines being hacked and loss of personal information

57%
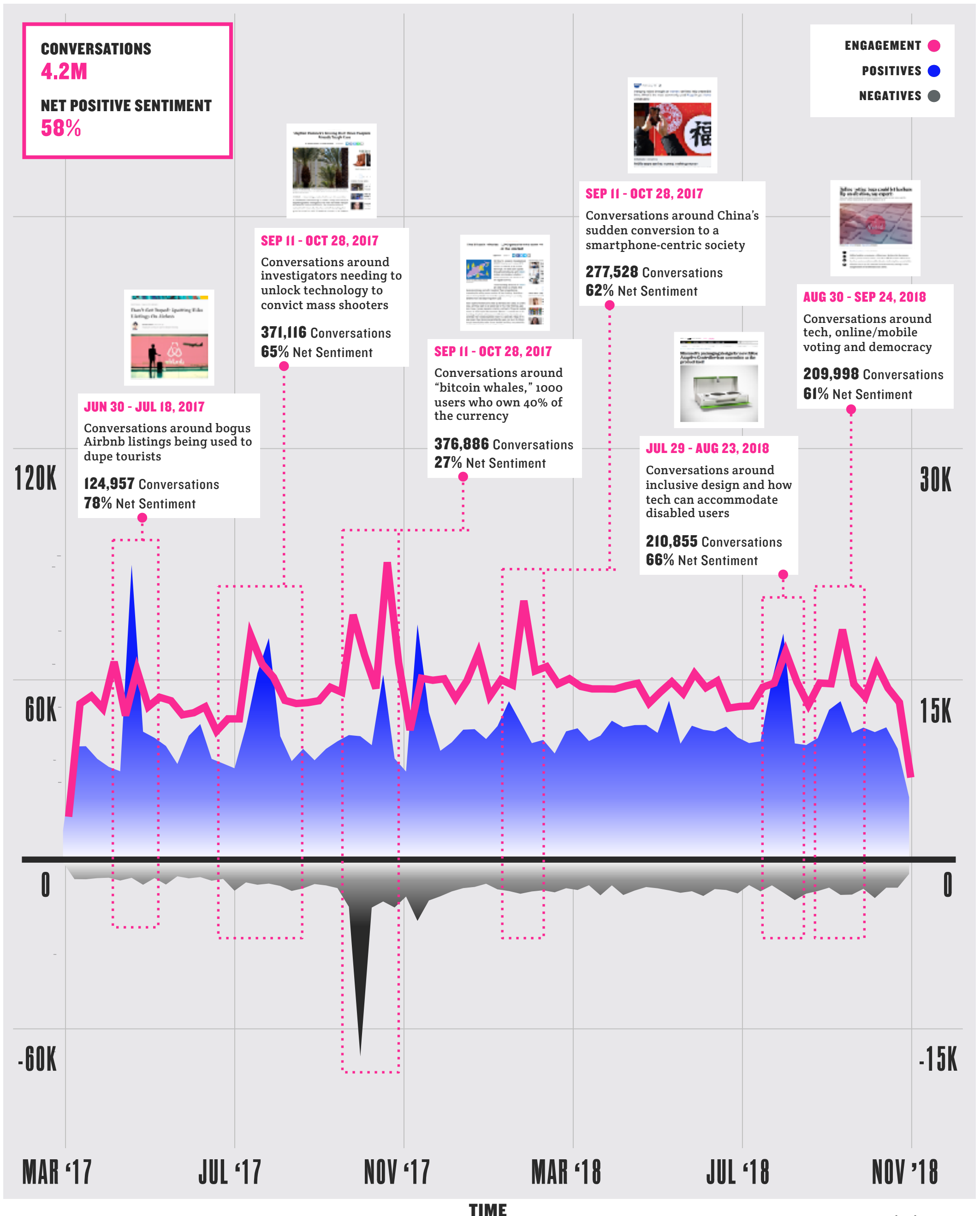AI machines becoming more intelligent than humans

63%
AI machines being unreliable

Source: PwC; ; ARM

Figure 15.0

THE YEAR IN THINGSOURCING

What are people saying?
Here are the topics that triggered some of the most energetic and polarizing conversations in 2018.

CONVERSATIONS
4.2M

NET POSITIVE SENTIMENT
58%

ENGAGEMENT ●
POSITIVES ●
NEGATIVES ●

SEP 11 - OCT 28, 2017
Conversations around
investigators needing to
unlock technology to
convict mass shooters

371,116 Conversations
65% Net Sentiment

SEP 11 - OCT 28, 2017
Conversations around China's
sudden conversion to a
smartphone-centric society

277,528 Conversations
62% Net Sentiment

SEP 11 - OCT 28, 2017
Conversations around
"bitcoin whales," 1000
users who own 40% of
the currency

376,886 Conversations
27% Net Sentiment

AUG 30 - SEP 24, 2018
Conversations around
tech, online/mobile
voting and democracy

209,998 Conversations
61% Net Sentiment

JUN 30 - JUL 18, 2017
Conversations around bogus
Airbnb listings being used to
dupe tourists

124,957 Conversations
78% Net Sentiment

JUL 29 - AUG 23, 2018
Conversations around
inclusive design and how
tech can accommodate
disabled users

210,855 Conversations
66% Net Sentiment

ENGAGEMENT

120K

60K

0

-60K

30K

15K

0

-15K

POSITIVES AND NEGATIVES

MAR '17   JUL '17   NOV '17   MAR '18   JUL '18   NOV '18

TIME

Source: sparks & honey, Q™

SOCIAL VERBATIMS:
THINGSOURCING

What are people discussing in relation to Thingsourcing? There's a shared dependency on technology, and wishlists for nonexistent tools and resources to make life even easier. But misgivings prevail about how much we actually rely on digital things to survive.

COMPARISONS OF WORKING TECH TO NONWORKING TECH

@PureF__s   October 19, 2018

I have an app that can scan a barcode and find me the cheapest can of soup in my area, why doesn't this exist for healthcare?

@ihear__a   December 14, 2018

If someone could build an app that pours what I haven't read on 100 best book lists into my goodreads account and then cross references them with my hold history in the library and places the holds at the right time that would be great.
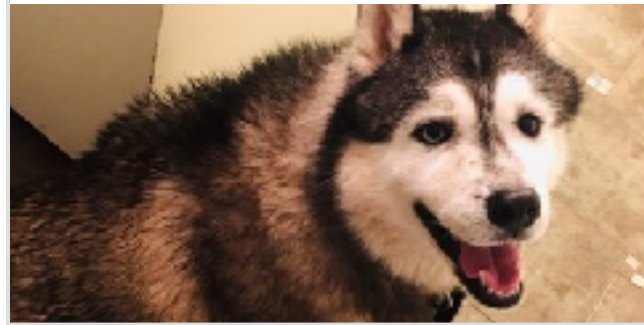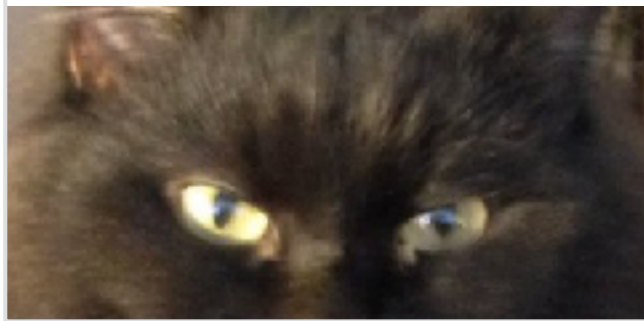
WISHFUL THINKING ABOUT NONEXISTENT TECHNOLOGY

DISCUSSIONS OF TECHNOLOGY DEPENDENCY

@Aun__o   December 12, 2018

This is how I handle it. I use the reminder function in my cellphone for *everything*. It tells me when to take my meds, when to return phone calls, what not to miss on TV: everything. It works great!

@tier__b   June 27, 2018

'Hi, we understand robots & AI can now open doors, carry boxes, detect motion, hold conversations, do complex sums, see through walls, do face recognition etc so to prove you are human please tick this box.'

POSTS ABOUT THE LIMITS OF PRESENT-DAY TECHNOLOGY

DECLARATIONS OF DESIRE FOR DIGITAL DETOX

@prof__s   December 13, 2018

I had already decided to no longer outsource my brain to my smartphone by turning off auto functions since dad has Alzheimer's, so taking this challenge of #NoPhoneforaYear #contest by @vitaminwater will allow this GRANDMA to GET HER GROOVE BACK and grab life by the bottles.

@star__a   December 8, 2018

Free business idea: an app/service that does my makeup/hair/nails simultaneously while I work at the same time. TAM is all working moms.

PROPOSALS FOR NEW TIME-SAVING TOOLS

Source: Twitter

CULTURAL SIGNALS:
THINGSOURCING

How is culture responding to the Thingsourcing trend? By considering whether to dumb down robots, and how to eliminate very human biases from machine intelligences.

THE PERILS OF THINGSOURCING: ARE WE LIABLE WHEN SOMEONE ELSE USES OUR VOICE ASSISTANTS TO MAKE UNAUTHORIZED PURCHASES?

"Alexa, call my lawyer," may become the mantra of the near-future, as the number of virtual assistant users is expected to grow to 1.8 billion by 2021. One of them is a parrot called Rocco who managed to secure his owner's voice-activated device and make purchases on his linked Amazon account, in a move that highlights the perils and security issues of our connected homes and devices — and bank accounts.

AS HUMANS RELY MORE AND MORE ON ROBOTS, RESEARCHERS SUGGEST THAT THE WAY TO SAFEGUARD AGAINST ROBOT TAKEOVER IS TO INTRODUCE "ARTIFICIAL STUPIDITY"

A pair of researchers, Michaël Trazzi and Roman V. Yampolskiy of France's Sorbonne University and the University of Louisville respectively, have proposed that concerns about dystopian outcomes related to the rise of machine intelligence have already become profound enough that AI should be made AS — Artificially Stupid. Specifically, they believe that the "general" intelligence (as opposed to specific, task-based capabilities) of AI should be limited to match what humans are able to match. The team asserts that artificial stupidity would not only protect humans from the threat of superintelligent machines, it would make AI, in general, more human and humane.


Alexa, what's 5 minus 3?

DEBATE OVER RELIANCE ON AI FOR PROBLEM SOLVING EMERGES AFTER VIRAL VIDEO OF CHILD ASKING ALEXA FOR HELP SOLVING ADDITION PROBLEMS

"Alexa, what's 5 minus 3?" When a 6-year-old boy asked that question in a video, which went viral on Twitter with more than 8.5 million views, a furor ignited over whether omnipresent AI was improving kids' ability to use their brains for other things or reducing their ability to independently solve problems for themselves.

Source: New Scientist; The Conversation; NPR

TRENDS 9 & 10

IT'S COMPLICATED

+

DIGITAL MINIMALISM
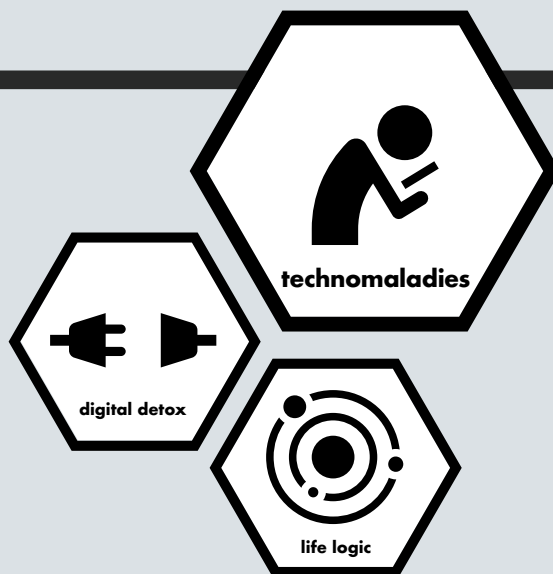
technomaladies

digital detox

life logic

Emerging Trends are just starting to gain traction; given the rapid pace of culture, they deserve eyeballs among brands, organizations and curious readers
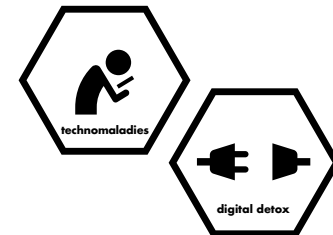
TREND 9

IT'S COMPLICATED

Technology is changing relationships rules and behaviors, from the romantic to the professional, often in strange and unpredictable ways.

ELEMENTS OF CULTURE

technomaladies

digital detox

It's getting harder and harder to navigate relationships now that they are so deeply tethered to tech. Connecting is easier, and real intimacy is harder (though false intimacy can come quickly and disappear just as fast). Terms that emerged out of digital-era dating behaviors — like "orbiting," "breadcrumbing" and "ghosting" — are now moving into other contexts. HR departments are reporting rising cases of job applicants and actual employees ghosting on jobs, simply vanishing without a word or a trace. Never easy to define, the subtle, ever-presence of technology is forging new boundaries of sudden attachments, detachments or forced intimacy in our lives. Just ask the couple who are divorcing thanks to a Fortnite addiction.
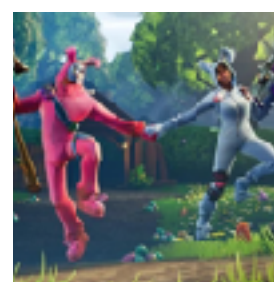
SIGNALS

Politics are heating up dating

Genetic testing reveals unknown relatives

Finding love or hookups on Instagram

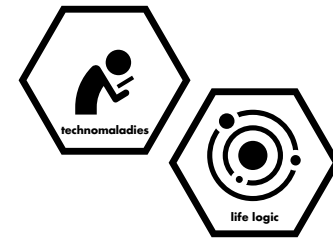*Couple divorcing over husband's Fortnite addiction*

DIGITAL MINIMALISM

We are turning to stripped-down, self-limited tools and services that are designed for a small number of uses.

ELEMENTS OF CULTURE

technomaladies

life logic

We are turning to stripped-down, self-limited versions of devices, wearables and tools that are purposely designed for a small number of uses. A reaction against the nonstop noise and complexity that comes with connectivity, Digital Minimalism is an empowering expression of time- and self-management. Not quite a full digital detox, Digital Minimalism embraces simpler connected lifestyles that are purposely designed to be limited — not dumbphones, but dumber phones, or apps and platforms with aggressively streamlined interfaces and feature sets intended to be used for niche purposes. The goal? Cutting back on tech without cutting the cord entirely and perhaps tailoring your "available" status to a select few. And keeping your sanity in the process.
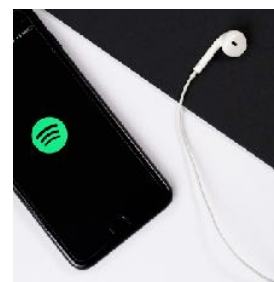
SIGNALS

I'm not on Facebook, so I forgot your birthday

The Palm "Miniphone"

Muji's self-driving bus

Mute and block artists on Spotify

IMPLICATIONS FOR BUSINESS AND ORGANIZATIONS:
TECHNOMALADIES

1__

CONSIDER HOW TO RADICALLY STREAMLINE YOUR BRAND — AND GIVE CONSUMERS ACCESS TO IT

As attention spans shrink and consumers face data and choice overload, they're seeking brands with clear purpose, simple promises and frictionless means of access. Is there a "one-click" option for your brand?

KEY CATEGORIES IMPACTED:

Consumer packaged goods, retail/ e-commerce, banking, healthcare

2__

MAKE YOUR BRAND AN OASIS

Consumers are swimming in a turbulent sea of information. They may well be grateful if your brand can provide them with an anchor and a moment of quiet rather than even more noise in the system.

KEY CATEGORIES IMPACTED:

Beauty, food & beverage, media, technology

3__

LEAN INTO THE HUMAN PREMIUM

Technology can deliver boosted efficiency and convenience, but it can also amplify headaches. Humans are expensive — but in many cases, refreshing, especially when it comes to customer service.

KEY CATEGORIES IMPACTED:

Banking, retail/e-commerce, travel & transportation, healthcare

4__

SHOW THAT YOU ARE THERE

Brands also have to demonstrate they're "present" with small reminders to customers that you're aware of them in a consumer landscape that often feels devoid of sincerity and empathy.

KEY CATEGORIES IMPACTED:

Retail/e-commerce, banking, travel & transportation, beauty

BREAKING THE ORDINARY

Reframing the ways in which we think about ourselves to accommodate divergent perspectives, disruptive identities and new ways of imagining the nature of humanity

outsiders welcome

The present convergence of crises—in money, energy, education, health, water, soil, climate, politics, and more— is a birth crisis, expelling us from the old world into a new. We sense that "normal" isn't coming back, that we are being born into a new normal: A new kind of society, a new relationship to the earth, a new experience of being human.

Charles Eisenstein, Sacred Economics

THE DEFINITION OF US CONTINUES TO EXPAND

The path to reconnecting with our world requires the normalization of new and unfamiliar identities, values and behaviors.

In the face of drastic political extremes, natural disasters that disrupt our sense of security and cultural shifts that have changed the way we think about our work or lifestyles in the long term, our human species continues to adapt. Yet, an unexpected outcome of the instability we face on a daily basis is a sense of liberation from the past.

With the world in uncertain flux, we feel freer to embrace boundary-free identities and to adopt new means to accommodate the divergent perspectives of an ever-wider range of people. We track these shifts through our Element of Culture Outsiders Welcome, which explores how our definition of "us" has continued to widen over time.

But as a vastly more complicated portrait of humanity emerges, it has become harder for us to track and adapt to evolving conventions and definitions of identity, the more technology has stepped in to provide us with machine-generated clarity around who we each of us is at any given place and time. We explore this in a trend we call Algorithms as the New Demographics. Do these digital arbiters of identity actually solve the problem of a world without checkboxes — or are they simply a source of new, incomprehensible stereotypes?

The expansive nature of identity today means that things that once seemed alternative, eccentric or fringe are now being translated into new standards in policy, communication and creative expression. Norms set by traditions, privilege or even just common sense no longer prevail; everyone has a perspective they can argue is both uniquely theirs and wholly valid — just ask the passenger who was recently kicked off a flight for claiming a squirrel as her emotional support animal. We explore the increasingly flexible, real-time evolution of social convention in the trend of Renorming.

But these kaleidoscopic changes to our identities aren't just limited to race, gender and sexuality. In some cases, they cut to the very nature of who gets to be seen as a person (personhood) and whether it includes those who aren't biologically human, or perhaps even biological at all. We explore this "opting out of identity" in a trend we call Rethinking Humanity.

The expansive nature of identity today means that things that once seemed "alternative," eccentric or fringe are now being translated into new standards in policy, communication and creative expression.

We also examine two emerging trends: Blank Like Me, tracking the emergence of consumers who are purposely refusing to be defined in fixed and concrete terms — out of defiance or exhaustion, and Instant Counterculture, about the real-time creation of symbols and systems of protest and resistance that have emerged in our hyper-accelerated age.

Ultimately, the changes that are occurring now are just harbingers of even more profound ones to come. Brands need to consider how to respond to the ways in which the ground of identity is shifting beneath their feet if they want to keep up.

Figure 16.0

MOST PEOPLE GENERALLY BELIEVE IN COMMON GROUND

Even in an era where intolerance seems to be rising, two-thirds of global consumers believe we all share more in common than we are different.

People Across the World Have More Commonalities Than Differences

% of respondents who agree in each country

Country	%
RUSSIA	81%
SERBIA	81%
SOUTH AFRICA	77%
CHILE	77%
MEXICO	76%
PERU	76%
INDIA	76%
CANADA	73%
UNITED STATES	71%
ARGENTINA	70%
GREAT BRITAIN	70%
SPAIN	70%
CHINA	68%
SWEDEN	66%
AUSTRALIA	66%
MALAYSIA	64%
BRAZIL	61%
GERMANY	61%
FRANCE	61%
TURKEY	57%
SAUDI ARABIA	57%
BELGIUM	57%
ITALY	55%
POLAND	54%
SOUTH KOREA	49%
HUNGARY	48%
JAPAN	35%

65% AVERAGE
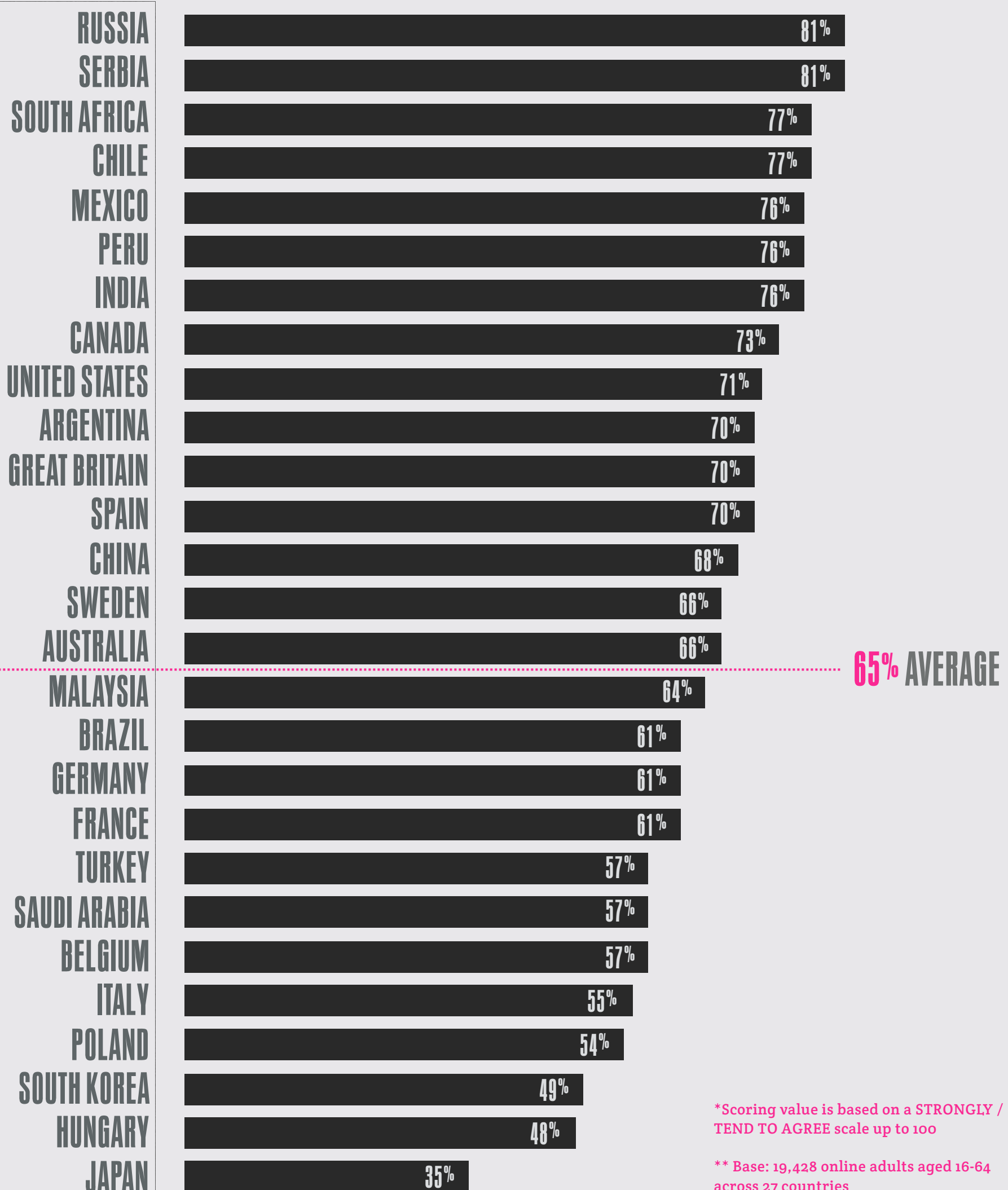
*Scoring value is based on a STRONGLY / TEND TO AGREE scale up to 100

** Base: 19,428 online adults aged 16-64 across 27 countries

Source: BBC / Ipsos Global Survey

Figure 17.0

IN THE WESTERN WORLD, BEING GAY IS MORE ACCÉPTED

The countries that are most accepting of homosexuality include Latin countries with predominantly Catholic populations.

Do You Agree That Homosexuality Should Be Accepted?

% of respondents who said "yes" in each country in
2007, and the rise from 2007 to 2017

Country	%	Rise
SPAIN	82%	+6%
GERMANY	81%	+6%
CANADA	70%	+10%
UNITED KINGDOM	71%	+5%
ITALY	65%	+9%
ARGENTINA	72%	+2%
MEXICO	60%	+1%
UNITED STATES	49%	+11%
JAPAN	49%	+5%
SOUTH KOREA	18%	+21%
CHINA	17%	+4%

% SAYING YES IN 2007 ●
RISE IN % SAYING YES IN 2017 ●

Source: Pew Global Research
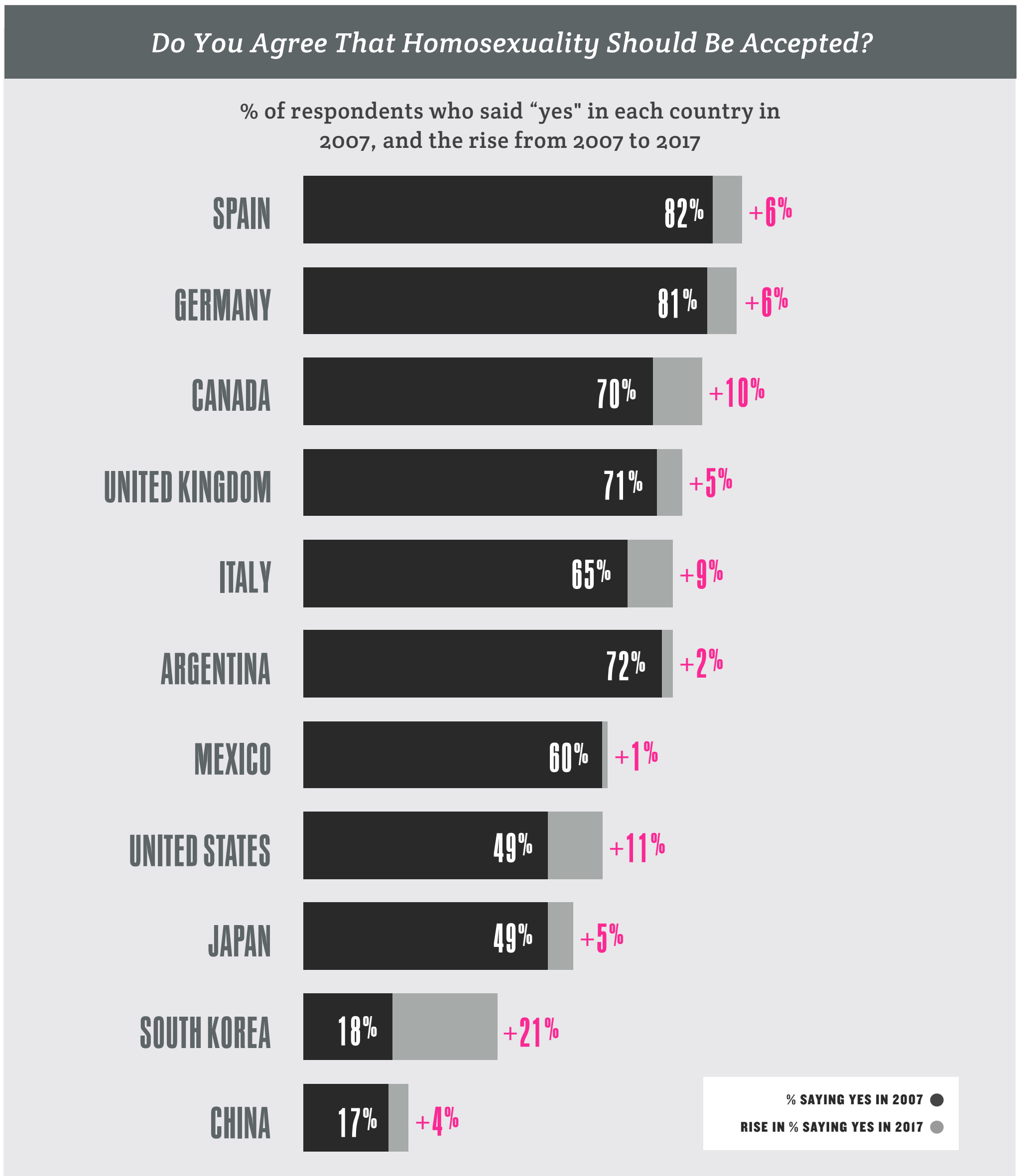
2018 TIMELINE:
OUTSIDERS WELCOME

A snapshot of moments in 2018 that defined Breaking the Ordinary.

In 2018, we saw greater openness toward boundary-free identities and more attempts to accommodate the perspectives of an ever-wider range of people

Orange Is the New Black star Laverne Cox becomes the first transgender cover model for *Cosmopolitan* magazine.

January

Scientists release further information about "Cheddar Man" — a fossil found in 1903 — suggesting that he has blue eyes, dark skin and dark curly hair.

February

Black Panther is released and within a few months becomes the ninth-highest-grossing film of all time.

February

As part of a special issue on race, *National Geographic* issues a statement in its April 2018 issue that acknowledges and apologize for the "racist lens" with which it covered global humanity across its 13-decade existence.

April

At the same time, 2018 saw friction and backlash as these shifting identities came into conflict with lingering traditional attitudes and values

250 cities host the Women's March in its second year, where hundreds of thousands of people march to voice their disapproval of Trump's antiwoman policies and misogynist behavior and attitudes.

January

United Airlines bans an "emotional support peacock" from flying in-cabin with its owner.

January

Marjory Stoneman Douglas High School shooting ignites the #NeverAgain and March for Our Lives movements.

February

A New York grand jury indicts Harvey Weinstein on charges of sexual abuse and rape.

May

The line between human and non-human became blurrier in numerous ways in 2018 — which triggered both anxiety and fascination

Three-year study by Hunter College researchers concludes that dolphins achieve mirror self-recognition at a younger age than human infants.

January

Facebook's AI research program announces its chatbots not only developed their own language, but also figured out a way to deceive humans — prompting an argument between Elon Musk and Mark Zuckerberg over the potential dangers of AI.

July
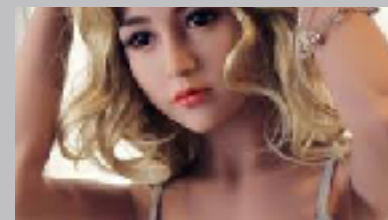
North America's first sex robot brothel, Aura Dolls, opens in Toronto.

August
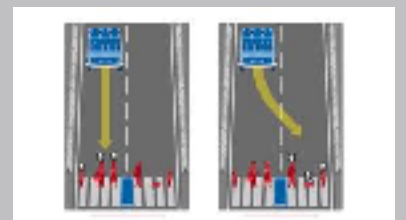
The Moral Machine, an online survey designed by MIT researchers, determines that people would rather have a self-driving car kill a criminal than a dog.

October

Microsoft reveals its Adaptive Controller made specifically for gamers with disabilities.

May

American actress Meghan Markle marries Prince Harry, becoming the first black member of the British royal family in the process.

May

China blacklists hundreds of thousands from travel based on its new "social scoring system."

November

Angela Ponce, Miss Spain, becomes the first-ever publicly transgender candidate for Miss Universe.

December

ALGORITHMS AS NEW DEMOGRAPHICS

The NFL announces that teams will be fined if players kneel during the National Anthem, and players who refuse are expected to stay in the locker room.

May

Saudi Arabia issues driver's licenses to 10 women, a historic move that came 20 days before the government had planned to lift its longstanding ban on women driving.

June

Google employees stage a mass global walkout to protest sexual harassment scandals.

November
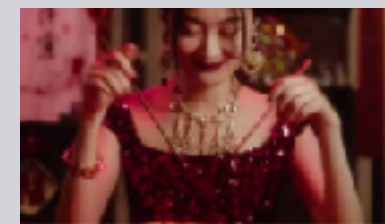
After receiving criticism for running web ads that Chinese people call offensive, co-founder Stefano Gabbana responds with racist rants on Instagram, leading to widespread boycott of the brand in China.

November

RENORMING
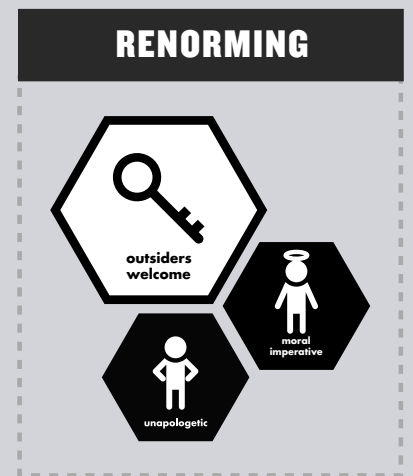
Pet owners spend half a billion dollars on Halloween costumes for their furkids — more than doubling the amount spent in 2010.

October
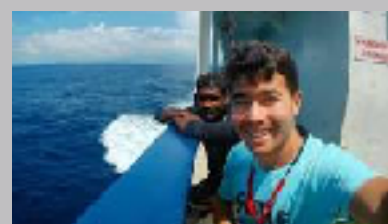
American missionary and adventure traveler John Allen Chau is killed by North Sentinelese, inhabitants of a "forbidden island" in the Andaman Sea off of India which has violently repelled contact with the rest of humanity for hundreds of years.

November

Chinese researcher He Jiankui abruptly announces that the first gene-edited babies — whose DNA has been modified to make them resistant to HIV — have been born.

November
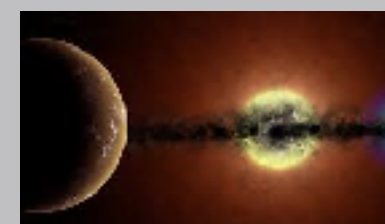
Scientists observe odd flickering in a faraway star, KIC 8462852, that some suggest is evidence of "alien megastructures."

November

RETHINKING HUMANITY

61% of Republican millennials say they believe "openness to the rest of the world" is essential to America's identity.

— Pew Resource Center

ALGORITHMS AS THE NEW DEMOGRAPHICS

Formulas and code are replacing checkboxes as identity becomes more complex

outsiders
welcome

data
divinity

cross
culturalism
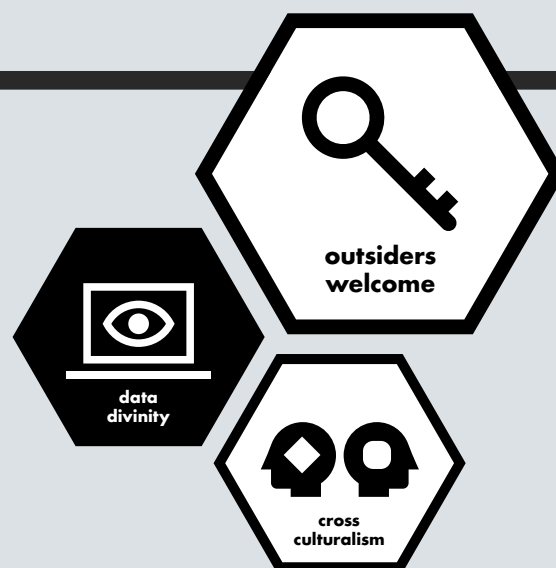
If a person knows nothing about how an algorithm is designed, they will think that the answer they get out of technology is right. The more you know about how algorithms work, the more you understand how subjective they are, but everyone should keep in mind that algorithms have biases as they are designed by people.

Dr. Fiona Kerr, Founder and MD, The NeuroTech Institute, sparks and honey Advisory Board member

DEFING
ALGORITHMS AS THE NEW DEMOGRAPHICS

Technology is being asked to define and predict who we are — for good and for ill — as the way we see ourselves becomes more detailed and complicated.

The upside of today's increasingly fluid definitions of identity is that the world is more inclusive, more open and more richly expressive than ever before. But this adaptiveness also makes it harder for our networks and the world beyond them to map out the ever-changing perspectives, intentions and desires of these identities. We've moved out of "check which box" territory, and into the domain of fractal hyper-personalization — and in most cases, the tools we're relying on to capture the nuanced behaviors and habits of the emerging Demographic of One are technological in nature.

Digital formulas and heuristics are defining our personas for machine intelligences to process. Each of us is being modeled in data into an ever-more intricate fashion, to fuel the engines of bespoke content recommendations, personalized medicine diagnoses, individualized fitness programs and customized apparel creation.

When our personal data is continuously rightsized against algorithms and fed back to us, the very lines between us and our algorithms become more blurry by the day: If a facial recognition algorithm interprets our expression cues as "happy" or "angry" and communicates that as our state, we may well begin to feel that emotion as a result.

Algorithms aren't just mirroring and influencing us; they are also acting on our behalf, predicting our needs and behaviors and doing what they anticipate we want

in real time: ordering food we like, sending instant emails that mimic our prose, or setting up schedules and mapping routes that conform to our daily habits.

Algorithms don't work in a vacuum. They're designed based on assumptions that can lead to creepy and unwanted surprises — often including dangerous biases.

For brands, this is both a warning and an opportunity. The upside of the invisible rise of Algorithms as New Demographics is amplified precision, effortless convenience and seamlessly tuned experiences. The downside is that algorithms don't work in a vacuum. They're designed based on benchmarks and assumptions that can't always reflect the full spectrum of human experience. These algorithms can lead to creepy and unwanted surprises — often including dangerous biases.

Interest rate discrimination from algorithms results in interest rates 5.6 basis points higher for African Americans and Latinx, UC Berkeley researchers found. Each extra basis point costs minority mortgage holders about $100 million annually.

—Daily Californian

Figure 18.0

EVEN AS ALGORITHMS TAKE OVER, TRUST IN TECHNOLOGY IS LIMITED

Machine-learning algorithms are beginning to move into every aspect of our lives, but consumers aren't yet comfortable with handing all the keys to their lives over to data-driven, formula-based decision-making.

How Much Do You Trust AI to Do the Following Tasks?

MONITORING & ADJUSTING ENERGY USE IN MY HOME
- 28
- 10
- 38

DRIVING A CAR OR TAXI I'M RIDING IN
- 52
- 24
- 76

MONITORING MY HOME SECURITY
- 32
- 12
- 44

MONITORING MY BABY OR CHILDREN
- 54
- 26
- 80

MONITORING MY HEALTH & WELLNESS
- 42
- 18
- 60

MANAGING MY FINANCIAL AFFAIRS
- 60
- 29
- 89

SHOPPING FOR FOOD
- 47
- 19
- 66

SHOPPING FOR OTHER ITEMS LIKE CLOTHING
- 48
- 20
- 68

- ● INCLINED NOT TO TRUST
- ● WOULD NOT TRUST AT ALL
- ● TOTAL (WOULD NOT TRUST)

Source: Accenture Strategy

Figure 19.0

ALGORITHMS REGULARLY LEAD TO BLACK PRISONERS BEING DENIED PAROLE MORE FREQUENTLY

The biggest concern is that algorithms can amplify and weaponize human bias, rather than eliminating it. **COMPAS**, an AI system for calculating risk of recidivism in determining parole, was found to systematically discriminate against black prisoners.

Recidivism Risk Scores as Predicted by COMPAS for Blacks and Whites

Risk Scores for 6,172 prisoners — 3,175 black and 2,103 white — broken out into deciles

WHITE ●
BLACK ●
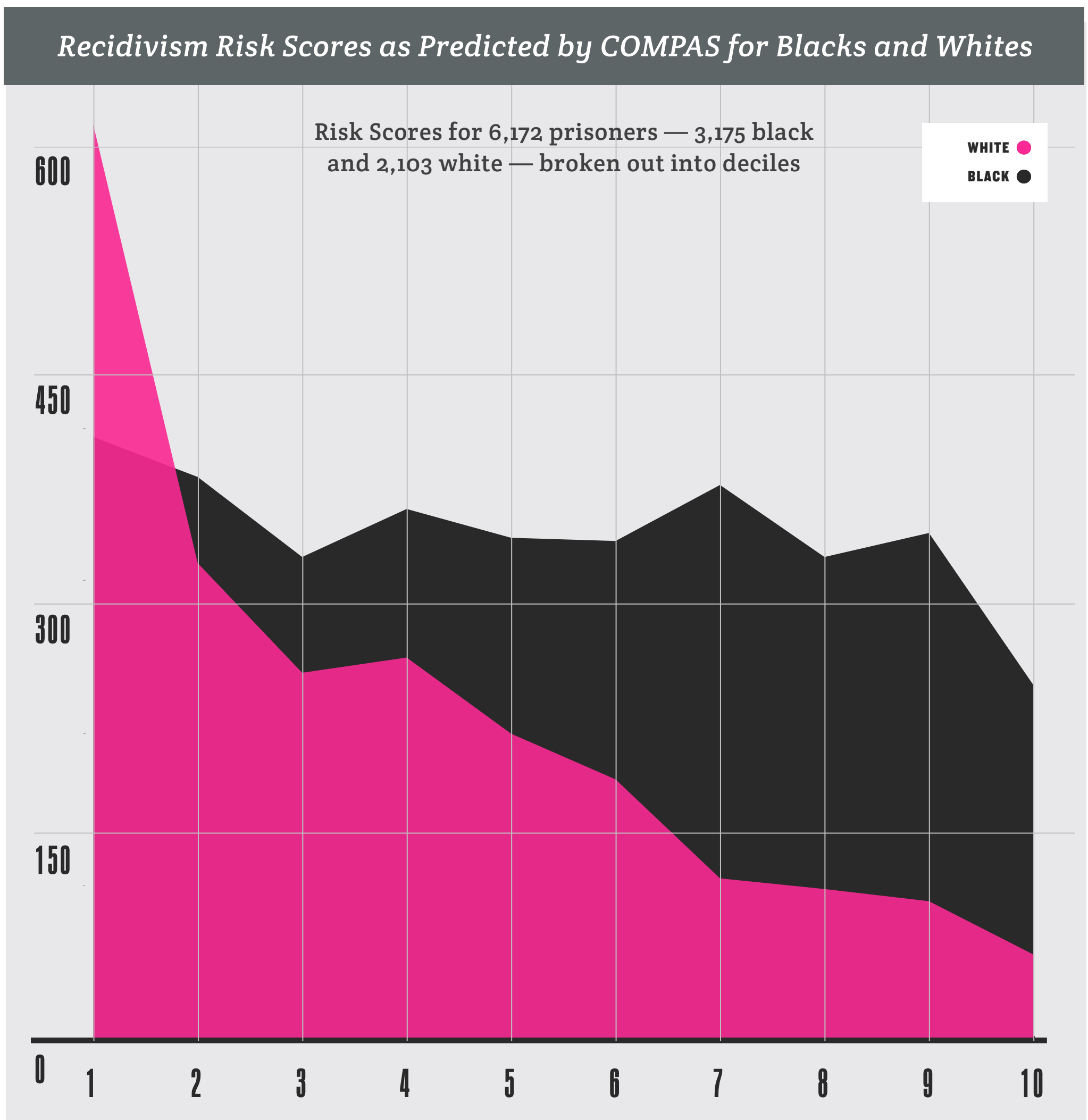
Figure 20.0

THE YEAR IN ALGORITHMS AS NEW DEMOGRAPHICS

What are people saying?
Here are the topics that triggered some of the most energetic and polarizing conversations in 2018.

CONVERSATIONS
4M

NET POSITIVE SENTIMENT
59%

ENGAGEMENT ●
POSITIVES ●
NEGATIVES ●

DEC 20 - DEC 30, 2017
Conversations around Facebook rolling out tools to block its own algorithms — specifically focusing on facial recognition

253,038 Conversations
96% Net Sentiment

NOV 12 - NOV 25, 2017
Conversations around the "ethical banking" movement, which is pushing back on algorithm-based lending decisions and aiming to be transparent and customer-centric

101,585 Conversations
-18% Net Sentiment

JUL 22 - AUG 20, 2018
Conversations around how Millennials are now picking their children's names based on available domain names

230,883 Conversations
40% Net Sentiment

DEC 20 - DEC 30, 2017
Conversations around whether 2018 will see the rise of the "Neo-Luddite" and a major backlash to tech's power in defining lifestyle and identity

175,260 Conversations
62% Net Sentiment

JUL 6 - JUL 22, 2017
Conversations around the secrets of corporate recruiters, including stereotyping, profiling and the use of tech to filter candidates

96,291 Conversations
75% Net Sentiment

MAY 29 - JUL 8, 2018
Conversations around Facebook beginning to use machine learning to "auto-tune" its myriad services

362,776 Conversations
41% Net Sentiment

76K | 150K

38K | 75K

0 | 0

-25K | -75K

MAR '17 | JUL '17 | NOV '17 | MAR '18 | JUL '18 | NOV '18

ENGAGEMENT

POSITIVES AND NEGATIVES

TIME

Source: sparks & honey, Q™

SOCIAL VERBATIMS:
ALGORITHMS AS NEW DEMOGRAPHICS

What are consumers saying in relation to **Algorithms** as **New Demographics**? They share whimsical stories about being "misread" by algorithms — or accidentally misleading them. But there's also concern over the darker consequences of algorithmic bias.

JOKES ABOUT CONFUSING YOUR ALGORITHMS

@Kar__n December 20, 2018

irreparably fucking up my spotify algorithm by listening to "total eclipse of the heart" 30 times in a row

@soca__l December 18, 2018

Facebook told Netflix and Spotify about the inner ho in my DMs and now only Hulu thinks I'm classy

JOKES ABOUT DATA SHARING ACROSS PLATFORMS

POINTING OUT WEIRD THINGS SOCIAL PLATFORMS THINK YOU LIKE

@amanda__r December 20, 2018

Things @Facebook thinks I'm interested in:

-1st person games

-Swing bowling ???

-Quartz (the rock)

-Lead (the metal)

-Chapters... just, in general

-Conquistador Hernán Cortés

-Annapolis, Maryland

@star__l03 August 24, 2018

TIL there's a page full of data twitter has based on my account activity and it thinks i'm not a dude

Gender	Female

JOKES ABOUT DATA TRACKING

@rob__s December 4, 2018

 Ad profiling can be so bad.

- I put my iPad on my parents' WiFi and now Amazon is giving me crazy recommendations.

- Pinterest thinks I want claret bridesmaid dresses.

Neither based on my browsing behaviour. Crude, IP-based.

It betrays privacy, and maybe even Christmas gifts.

COMPLAINTS ABOUT POORLY CONSTRUCTED ALGORITHMS

CURIOSITY ABOUT THE ORIGINS OF RECOMMENDATIONS

@_d__h December 8, 2018

Based on my Netflix picks someone at Netflix probably thinks I'm a convicted felon.

Source: Twitter

CULTURAL SIGNALS:
ALGORITHMS AS NEW DEMOGRAPHICS

How is culture responding to the Algorithms as New Demographics trend? By speeding up the use of algorithmic decision-making into more facets of human life — generally with little concern over its implications.

RESEARCHERS CREATED AN AI THAT CAN DETERMINE YOUR PERSONALITY BY SCANNING YOUR EYES

Researchers at Flinders University in South Australia fitted student subjects with eye-tracking glasses. They then asked the participants to walk around campus and visit a shop, as well as complete a personality questionnaire. Using their algorithm, the scientists found they were able to predict neuroticism, extraversion, agreeableness and conscientiousness, as well as perceptual curiosity, based only on the eye-movement tracking data.

CHINA'S LATEST COMMERCE UNICORN, PINDUODUO, TARGETS ALGORITHMIC MICRO TRIBES OF OLDER, LOWER-INCOME SHOPPERS TO DRIVE PURCHASE VOLUME

Pinduoduo, which raised $1.6 billion in a U.S. IPO in 2018, targets shoppers in third- and fourth-tier cities — with an emphasis on seniors — by giving them an opportunity to "team shop" with one another for significant bulk-rate savings. The platforms 195 million monthly users are presented with algorithmically adjusted savings opportunities that they can then share with their like-minded contacts; the more people buy, the lower the price, with discounts of up to 90% for "baokuan," or viral items.

VENEZUELA NOW HAS AN ID CARD THAT CAN TRACK AND PUNISH CITIZENS

Venezuela has debuted a new smart ID card known as the "carnet de la patria," or "fatherland card." The card transmits data about cardholders to government computer servers, and is tied to subsidized food, health and other social programs most Venezuelans rely on to survive. The card is being manufactured by Chinese telecom giant ZTE, and shows how China is exporting its social profiling techniques and methods of "digital authoritarianism."

Source: Elevated; Nerdist; Business Insider
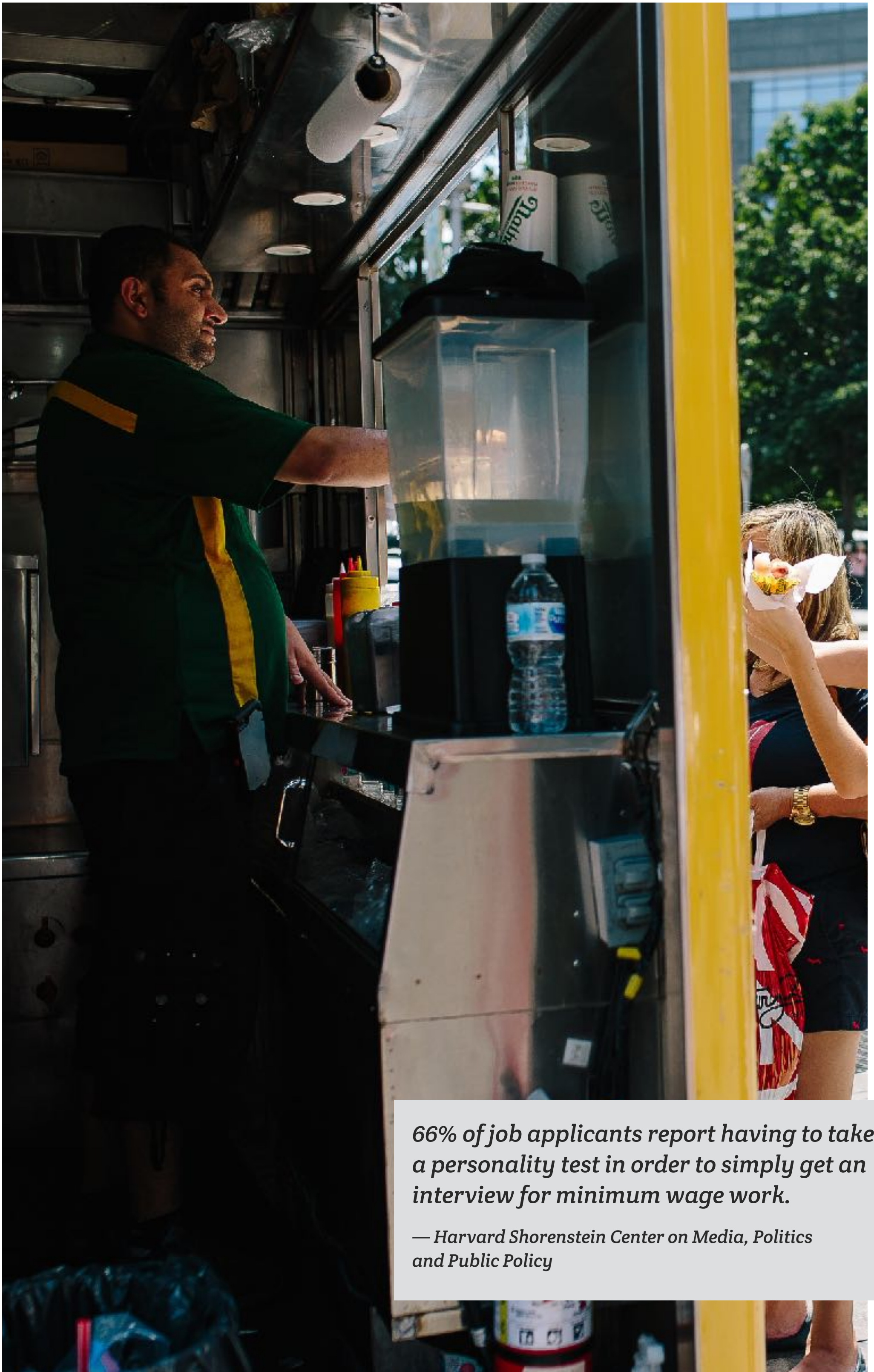
66% of job applicants report having to take a personality test in order to simply get an interview for minimum wage work.

— Harvard Shorenstein Center on Media, Politics and Public Policy

RENORMING

Responding to real-time shifts in what we value and believe

outsiders
welcome

unapologetic

moral
imperative

The beauty of norms is that they are flexible. They shift quickly; with the right pressure, they can shift back. But the response must be broad, and must come from sources of authority across the political spectrum. Otherwise, behaviors we think of as socially stable may prove far more fragile than we'd like to believe.

"How Norms Change," Maria Konnikova, The New Yorker

DEFINING
RENORMING

We are forced to constantly devise new rules to shift our speech, thinking and behavior as customs and conventions flex in real time.

When identities and ideologies flex in real time, our cultural standards end up in beta, all the time. We're forced to constantly devise new rules for our speech, thinking and behavior to accommodate new contexts, new expectations and even new realities.

Our infrastructure, both digital and physical, is slowly being reshaped to reflect a value system that reflects and respects more of us, in more ways.

The trend of Renorming tracks how our semantics and civilities are continuously shifting to serve our ever-adapting values.

The evolving norms of gender fluidity, for example, are forcing schools, organizations, HR departments and individuals to learn new ways of communicating when labels of gender are no longer obvious. Ten countries have introduced a gender-neutral designation on birth certificates, marking the baby's gender as simply "X." In the U.S, New York City and California have followed suit with this option.

Manifestations of Renorming are intended to empower and include micro-tribes of people who have been largely excluded from or silenced by the mainstream of society. The #MeToo movement has drawn attention to the gender biases in our society, and the horrific damage that has been caused as a result. Innovations are popping up to help people break out of their existing norms, like the bot that tells *Financial Times* reporters if they're only quoting men.

Our environments are being adapted to be accessible to people with disabilities. Our clothing is being redesigned to eliminate unnecessary gendering. Our infrastructure, both digital and physical, is slowly being reshaped to reflect a value system that reflects and respects more of us, in more ways.

It is no longer an option but a necessity for brands to develop, design and communicate in more inclusive ways. And listening to (and asking) consumers how they want to be treated and addressed is the essential opener to any relationship. Renorming isn't a destination but a process and a mindset — one that requires a constant state of awareness and flexibility.

A 2018 survey by The Hollywood Reporter found that 52% of fans would support a black James Bond, 39% a Hispanic Bond, 37% an Asian or female Bond and 28% a gay Bond.

— *The Hollywood Reporter*

Figure 21.0

GENDER NORMS ARE SHIFTING ACROSS THE WORLD

The majority of global consumers believe that men should share more of the nurturing burden — and women should be granted more political power.

Men Have Greater Responsibility for Home and Childcare Than Ever Before	*The World Would Be Better if More Women Were in Charge of Political Systems*
% who agree	% who agree

Men Have Greater Responsibility for Home and Childcare Than Ever Before (% who agree)

Country	%
INDIA	81
INDONESIA	79
UNITED KINGDOM	76
SOUTH KOREA	76
CANADA	75
UNITED STATES	73
GERMANY	72
SOUTH AFRICA	72
ITALY	72
MEXICO	70
SWEDEN	69
GLOBAL	69
SPAIN	69
BRAZIL	61
JAPAN	55
RUSSIA	39

The World Would Be Better if More Women Were in Charge of Political Systems (% who agree)

Country	%
INDIA	79
SOUTH AFRICA	70
BRAZIL	69
ITALY	62
SPAIN	62
UNITED STATES	57
GLOBAL	57
UNITED KINGDOM	57
SWEDEN	57
CANADA	57
MEXICO	55
SOUTH KOREA	52
GERMANY	47
JAPAN	43
INDOMESIA	41
RUSSIA	34

Source: Ipsos Public Affairs

Figure 22.0

THE YEAR IN RENORMING

What are people saying?
Here are the topics that triggered some of the most energetic and polarizing conversations in 2018.
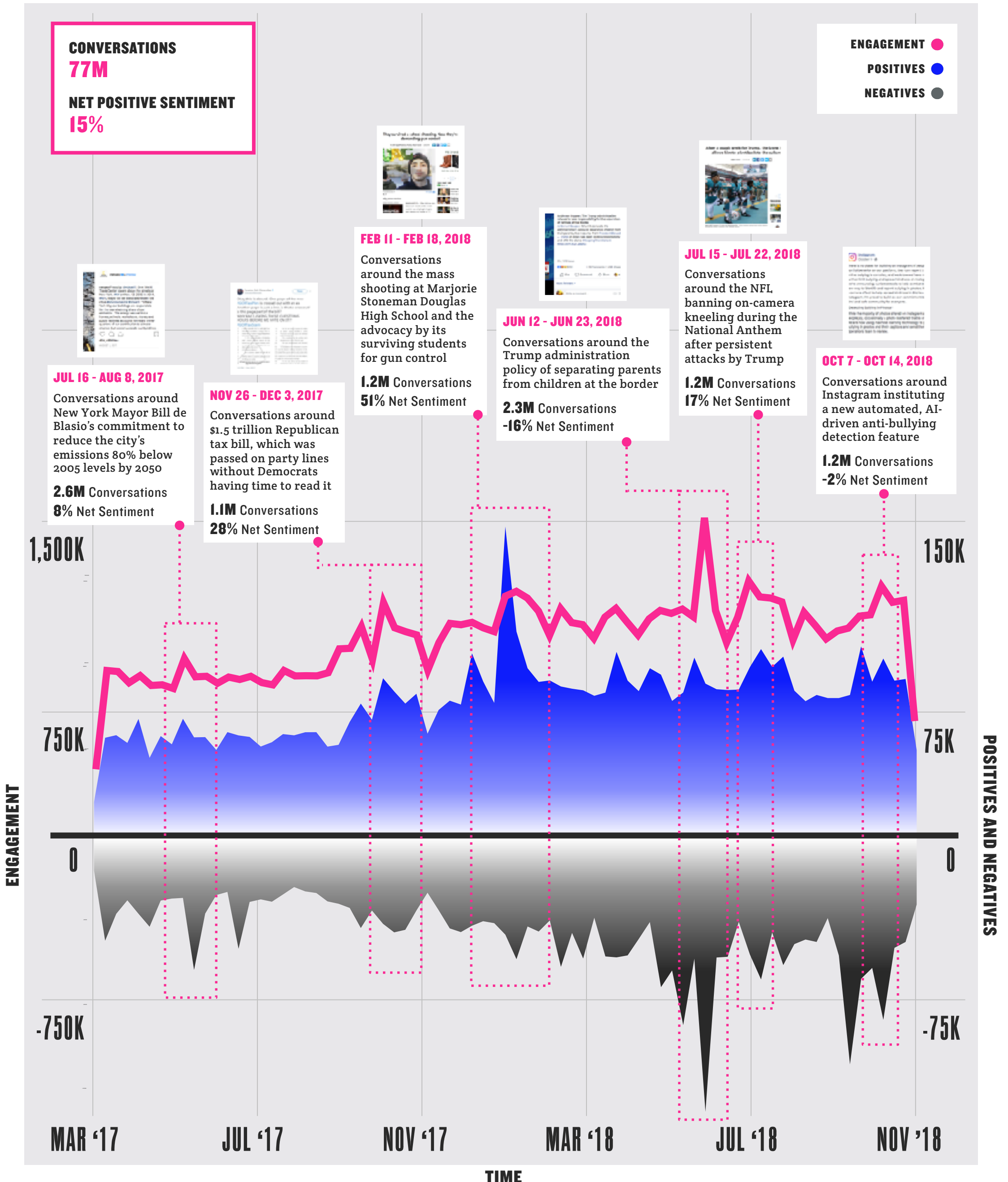
CONVERSATIONS
77M

NET POSITIVE SENTIMENT
15%

ENGAGEMENT ●
POSITIVES ●
NEGATIVES ●

FEB 11 - FEB 18, 2018
Conversations around the mass shooting at Marjorie Stoneman Douglas High School and the advocacy by its surviving students for gun control

1.2M Conversations
51% Net Sentiment

JUN 12 - JUN 23, 2018
Conversations around the Trump administration policy of separating parents from children at the border

2.3M Conversations
-16% Net Sentiment

JUL 15 - JUL 22, 2018
Conversations around the NFL banning on-camera kneeling during the National Anthem after persistent attacks by Trump

1.2M Conversations
17% Net Sentiment

OCT 7 - OCT 14, 2018
Conversations around Instagram instituting a new automated, AI-driven anti-bullying detection feature

1.2M Conversations
-2% Net Sentiment

JUL 16 - AUG 8, 2017
Conversations around New York Mayor Bill de Blasio's commitment to reduce the city's emissions 80% below 2005 levels by 2050

2.6M Conversations
8% Net Sentiment

NOV 26 - DEC 3, 2017
Conversations around $1.5 trillion Republican tax bill, which was passed on party lines without Democrats having time to read it

1.1M Conversations
28% Net Sentiment

ENGAGEMENT

POSITIVES AND NEGATIVES

1,500K

750K

0

-750K

150K

75K

0

-75K

MAR '17   JUL '17   NOV '17   MAR '18   JUL '18   NOV '18

TIME

Source: sparks & honey, Q™

SOCIAL VERBATIMS:
RENORMING

What are consumer saying in relation to Renorming? They share how the ground has shifted in small, surprising ways in the world around them — sometimes seriously, sometimes satirically.

CONCERNS ABOUT CHANGING VALUES

@trav__t   December 14, 2018

How 'Baby, It's Cold Outside' Went From Parlor Act to Problematic, via @nytimes: Well if you look at lyrics with " fresh eyes " you look at NEW INTENTIONS...as a " fresh take".

This WWII song was take on new norms...for those times!

EXHORTATIONS TO CONTINUE TO PUSH THE ENVELOPE

@dwar__i   December 12, 2018

Where does it stop? It doesn't. It's about always looking at how we as a society treat each other. It's especially about how and what we are teaching our young. #DwarfismAwareness

It's not about being "politically correct" to a bunch of "snowflakes" who need to "grow a pair". It's about realizing that you are rarely aware of the battles that people are waging and its more about being a sensitive and caring friend or neighbor. Some people have thick skin and can "take it", but not everyone has the armor needed to wage that type of war.

Don't you DARE tell a person of short stature that when they hear the word MIDGET, in any context, that they don't have a right to be offended. Lots of words used 10, 20, or 30 years ago aren't used any longer. It's called evolution.

Back in the early 90's when I taught in Canada I coached a MIDGET boys basketball team at NDHS. The word MIDGET was used to describe an age group, as it still does in many sports today. I was not offended by the word back then, and in fact, I kind of looked at it as a challenge. Honest me, this guy with dwarfism, coaching a team of boys to play basketball. Heck we even won the Kawartha Championship one year. But I was single back then, without a son. I shrugged my shoulders and didn't care. But now, we have a son, who also has dwarfism and we could never imagine him wanting to be involved in sports where that word is used as a designation for an age group.

Was the word MIDGET ever used to try and "hurt" me? It sure was, and still is today, but I never let that happen. But not everyone has that ability. I can thank the family that raised me for instilling that ability in me. I want to help others attain that skill. But for some, it's a difficult skill to acquire.

Removing that word from sports teams does not change the team one little bit. And "just because that's the way it's always been done" is never a valid excuse. It's not about bowing to political pressure. It's about being decent and compassionate.

Where does it stop? It doesn't. It's about always looking at how we as a society treat each other. It's especially about how and what we are teaching our young.

SNARK INTENDED TO PROVOKE THOSE WITH OUTMODED NORMS

@24.7_es   December 20, 2018

24.7lgbtq_memes#gay #lesbian #bisexual #queer #lgbt #lgbtq #lgbtmemes #lgbtqmemes #lebtq+ #notstraight #trans #gaymemes #lesbianmemes #funny #memes

ASSERTIONS OF ALLYSHIP
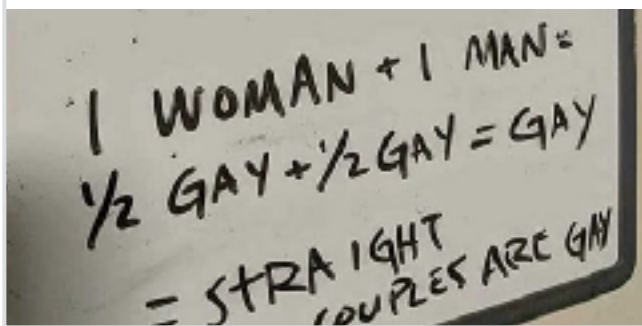
@prid__l   February 25, 2018

An honour to campaign alongside #LGBT+ folk who play at grass roots - many of whom are also LGBT fans of @premierleague & @EFL clubs; together we are changing expectations and experience of #football

London Falcons FC @londonfalcons - Feb 26
#LGBTHistoryMonth and #FHV2018 finish today and it's worth taking a minute of our time to thank @FAntveex @kickitout @pdidalntorball @stonewalUk for the great work they do throughout the year. It feels like the past year has seen a real breakthrough. Great work everyone!

CELEBRATION OF INCLUSIVE NEW REALITIES

@liza__r   February 26, 2018

it's happening...commitment to gender equity as the new normal

London Falcons FC @londonfalcons - Feb 26
#LGBTHistoryMonth and #FHV2018 finish today and it's worth taking a minute of our time to thank @FAntveex @kickitout @pdidalntorball @stonewalUk for the great work they do throughout the year. It feels like the past year has seen a real breakthrough. Great work everyone!

Source: Twitter, Instagram

CULTURAL SIGNALS:
RENORMING

How is culture responding to the Renorming trend? By considering whether to dumb down robots, and how to eliminate very human biases from machine intelligence.

MILLIONS OF INDIAN WOMEN PROTEST THE BAN OF WOMEN FROM WORSHIPPING AT INDIA'S OLDEST HINDU TEMPLES

India's Supreme Court lifted a ban in September on women entering Sabarimala temple in Kerala. Despite the ruling, priests continued to block women, leading to protests in which millions of Indian women formed human chains — including one that stretched more than 375 miles — to demonstrate against the ban on women worshipping in the country's holiest temples.

GILLETTE UPDATES ITS SLOGAN, "THE BEST A MAN CAN GET," WITH A CHALLENGE TO MEN TO BE BETTER IN AN AGE OF TOXIC MASCULINITY

Marking the 30th anniversary of its famous tagline, "The Best a Man Can Get," razor company Gillette released an updated and provocative ad tackling bullying, sexism and #MeToo, laying responsibility on men to be better. "Is this the best a man can get?" a voiceover asks with an ironic tone as a gang of bullies chases a victim through a screen showing a vintage ad for the razor brand. The ad is backed by a commitment to donate at least $1 million annually over the next three years to organizations designed to help men of all ages "achieve their personal best."
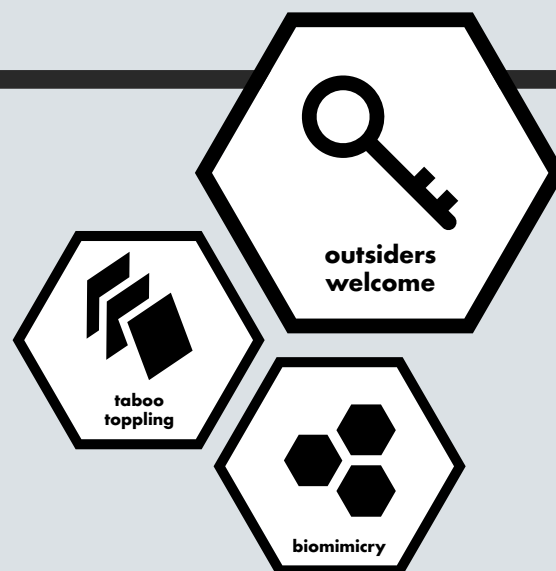

BREAKING BOUNDARIES IN HOLLYWOOD: TRANSGENDER CHARACTERS JOIN THE DC AND MARVEL ON-SCREEN UNIVERSES

The CW's cult-hit series *Supergirl* introduced a new hero, Dreamer, who will be TV's first transgender costumed crusader — played by Nicole Maines, a trans woman actor. The reveal came on the heels of Sony and Marvel announcing that its *Spider-Man* sequel, *Spider-Man: Far From Home*, would include a character played by trans man actor Zack Barack.

Source: Adweek; AP; PinkNews; Hollywood Reporter

TREND 13
RETHINKING HUMANITY

Deconstructing and expanding the definition of "us"

outsiders
welcome

taboo
toppling

biomimicry

In January, the EU Parliament debated a new legal status for robots as "electronic persons." Courts in Argentina, Colombia and India recognize apes and bears as having certain rights, such as habeas corpus. Courts in New Zealand, Ecuador and Colombia have extended the status of rights-bearing person to nature herself.

"Beyond the 'Human' in Human Rights: The Universal Declaration at 70"
Scientific American

DEFINING
RETHINKING HUMANITY

Advances in space exploration, AI, cognitive psychology and digital biology forge new meaning to being "people."

We live in an age where computers can readily outpace humans in sheer processing power: A typical fifth grade student can do basic arithmetic at the rate of about one problem per second. The phone in your pocket can do around a *billion* math operations per second.

But computers are still at the the level of toddlers when it comes to tasks that humans do effortlessly, like facial and language recognition. But the gap between "natural" and robot intelligence is shrinking every day. A crowdsourced prediction project run by Oxford University's Future of Humanity Institute, including insights of over 350 neural computing researchers, estimated a 50-50 likelihood that machines would be able to accomplish every task a human worker could accomplish better, faster and more cheaply — in less than half a century.

The emergence of human-capable AI brings up a range of ethical questions. Should intelligent robots have rights, and if so, how should these rights compare to those of humans? How would the emergence of another intelligent "species" on Earth — albeit one made by humans — impact the way we define personhood?

Of course, many claim that there are already other intelligent species on Earth, pointing to our fellow primates, the chimpanzees who are tool users capable of learning complex language; to dolphins who are able to recognize themselves in a mirror at an earlier age than human children can; to whales, elephants and even crows — who have been observed not just using tools, but actually making them out of multiple smaller units.

Very real debates about whether these "thinking creatures" should also be treated as people have emerged from a legal perspective. Last April, a New York court denied legal personhood to two chimps, Kiko and Tommy, but eminent scholars like Lawrence Tribe weighed in to disagree with the ruling. (In a separate April ruling, Naruto, a crested macaque from Indonesia, also lost his final appeal for copyright of the selfies he took on photographer David John Slater's camera.)

Not that Earth should be seen as the final frontier for personhood: One in two people around the world believe that intelligent alien civilizations exist in our universe, and as space exploration progresses, we're seeing more signals that could very well be evidence that that belief is true.

How would the emergence of another intelligent "species" impact the way we define personhood?

Meanwhile, continued advances in emergency and fetal care and disruptive revolutions in genomics and genetic engineering are collectively forcing us to think about the nature of personhood within the human species. Is someone a person whose brain has ceased functioning? What about an embryo that can't survive outside of a mother's womb? What legal status should cloned humans have, or gene-spliced ones? What relationship should they have with the sources of their DNA?

All of these conversations seem to be cresting, and we're tracking them via the trend Rethinking Humanity. For brands, these discussions on the fundamental nature of personhood, relationship and identity may seem remote — but given that DNA-testing kits and AI-connected smart speakers were both "hot gifts" for the 2018 holidays, they're in truth closer than anyone might have possibly ever imagined.
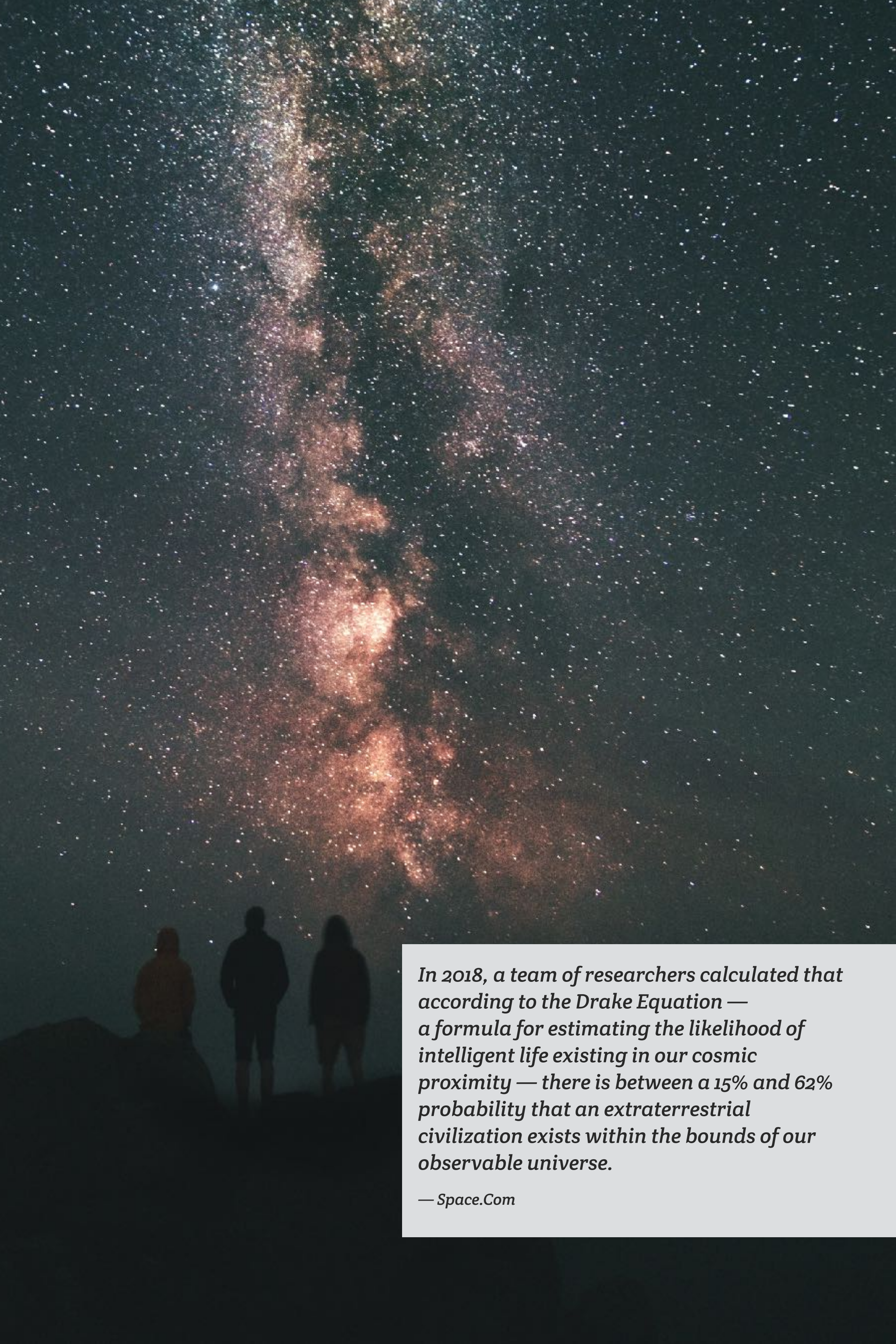
In 2018, a team of researchers calculated that according to the Drake Equation —
a formula for estimating the likelihood of intelligent life existing in our cosmic proximity — there is between a 15% and 62% probability that an extraterrestrial civilization exists within the bounds of our observable universe.
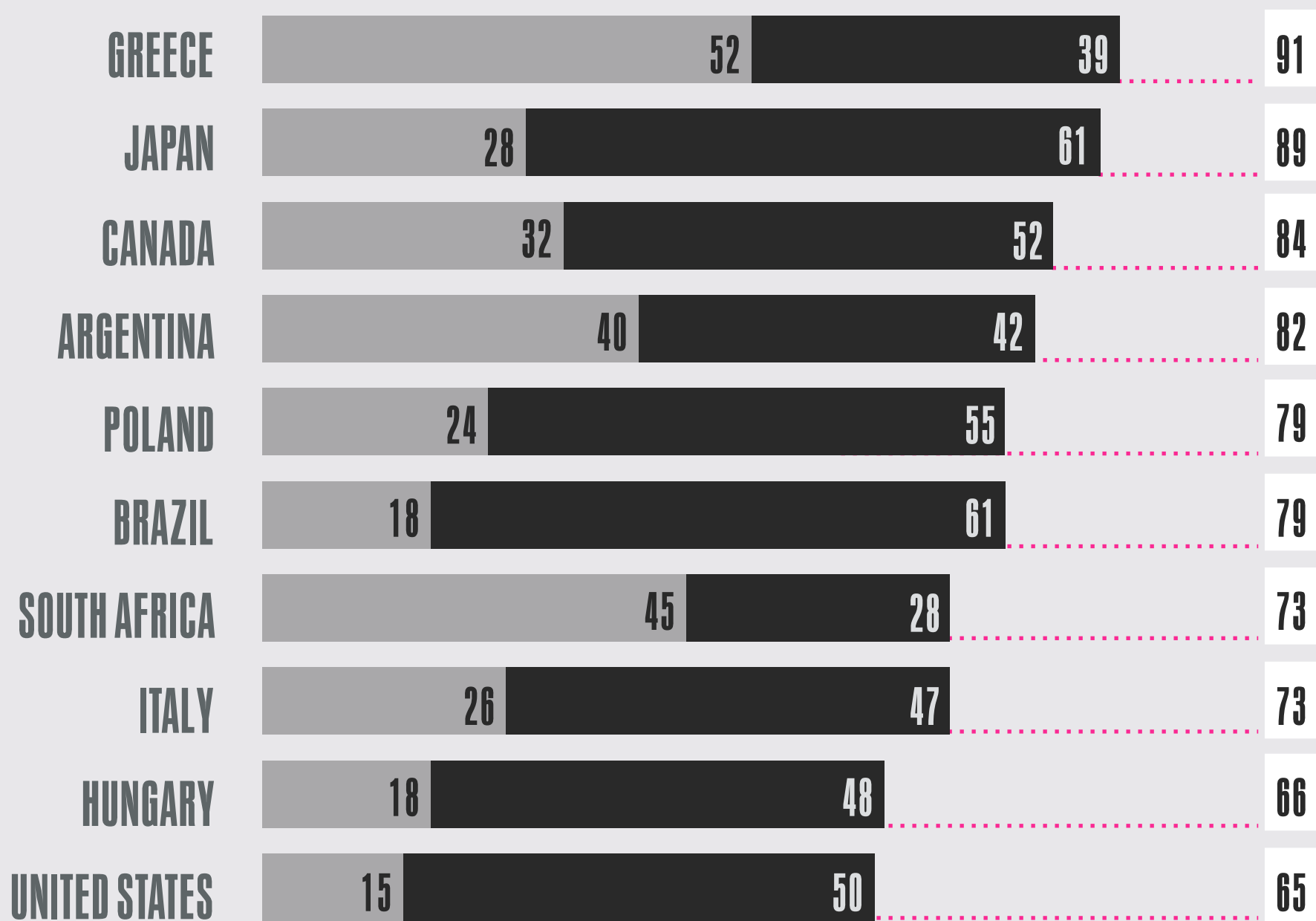
— Space.Com

Figure 23.0

MOST CONSUMERS THINK ROBOTS AND COMPUTERS WILL TAKE OVER MANY JOBS NOW DONE BY HUMANS

Globally, people foresee that within half a century, most human work will have been taken over by machines.

How Likely Do You Think it is That in the Next 50 Years, Robots and Computers Will Do Much of the Work Currently Done by Humans?

% who believe that it will definitely / probably happen (and total)

Country	Definitely	Probably	Total
GREECE	52	39	91
JAPAN	28	61	89
CANADA	32	52	84
ARGENTINA	40	42	82
POLAND	24	55	79
BRAZIL	18	61	79
SOUTH AFRICA	45	28	73
ITALY	26	47	73
HUNGARY	18	48	66
UNITED STATES	15	50	65

● DEFINITELY WILL HAPPEN   ● PROBABLY WILL HAPPEN   ○ TOTAL

Figure 24.0

MOST GLOBAL CONSUMERS THINK WE'RE NOT ALONE

Most people also assume that there are other intelligent species in the cosmos — and that our reinvigorated focus on space will eventually lead us to evidence of them.

Do You Believe in the Existence of Intelligent Alien Civilizations in the Universe?
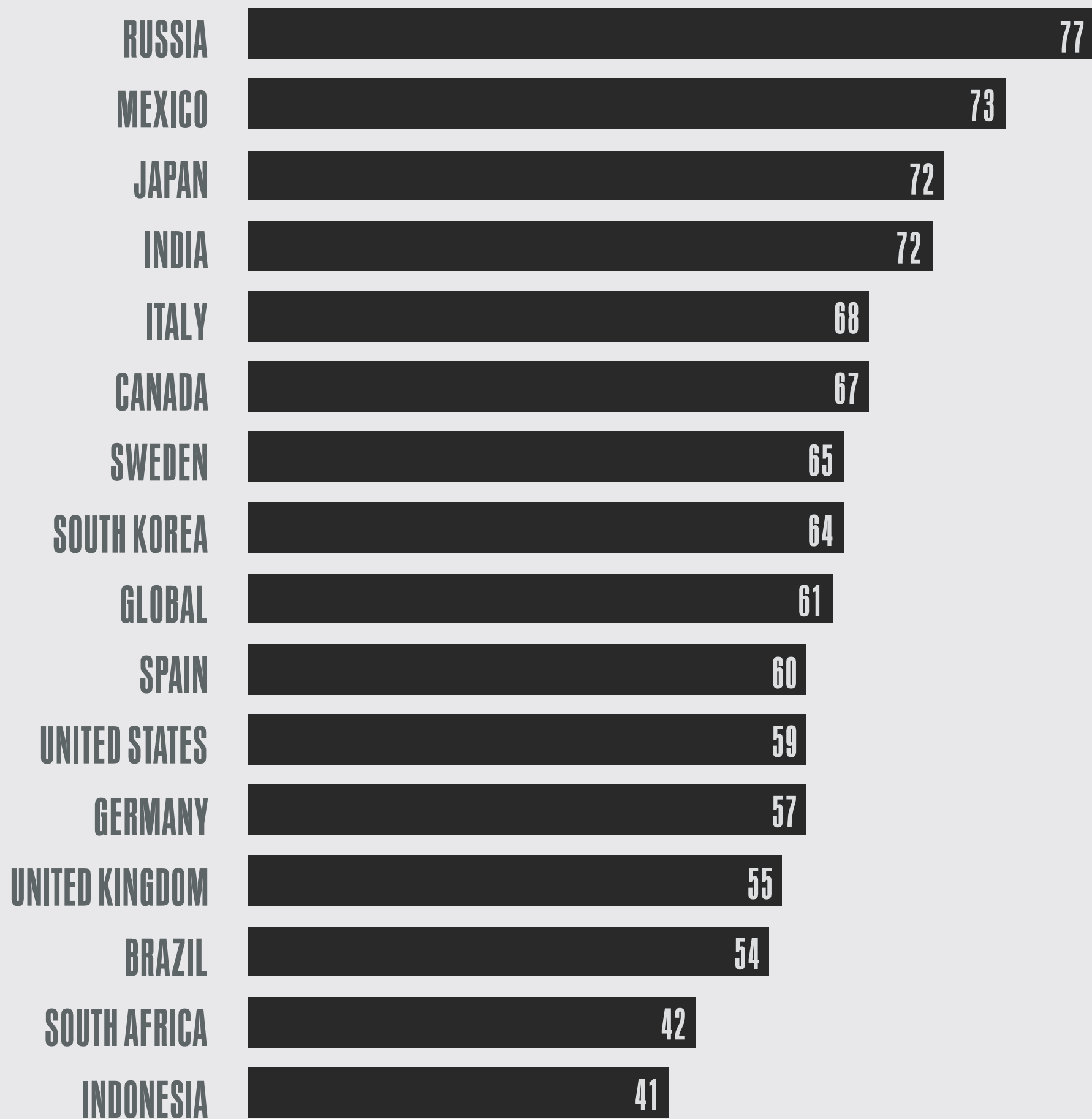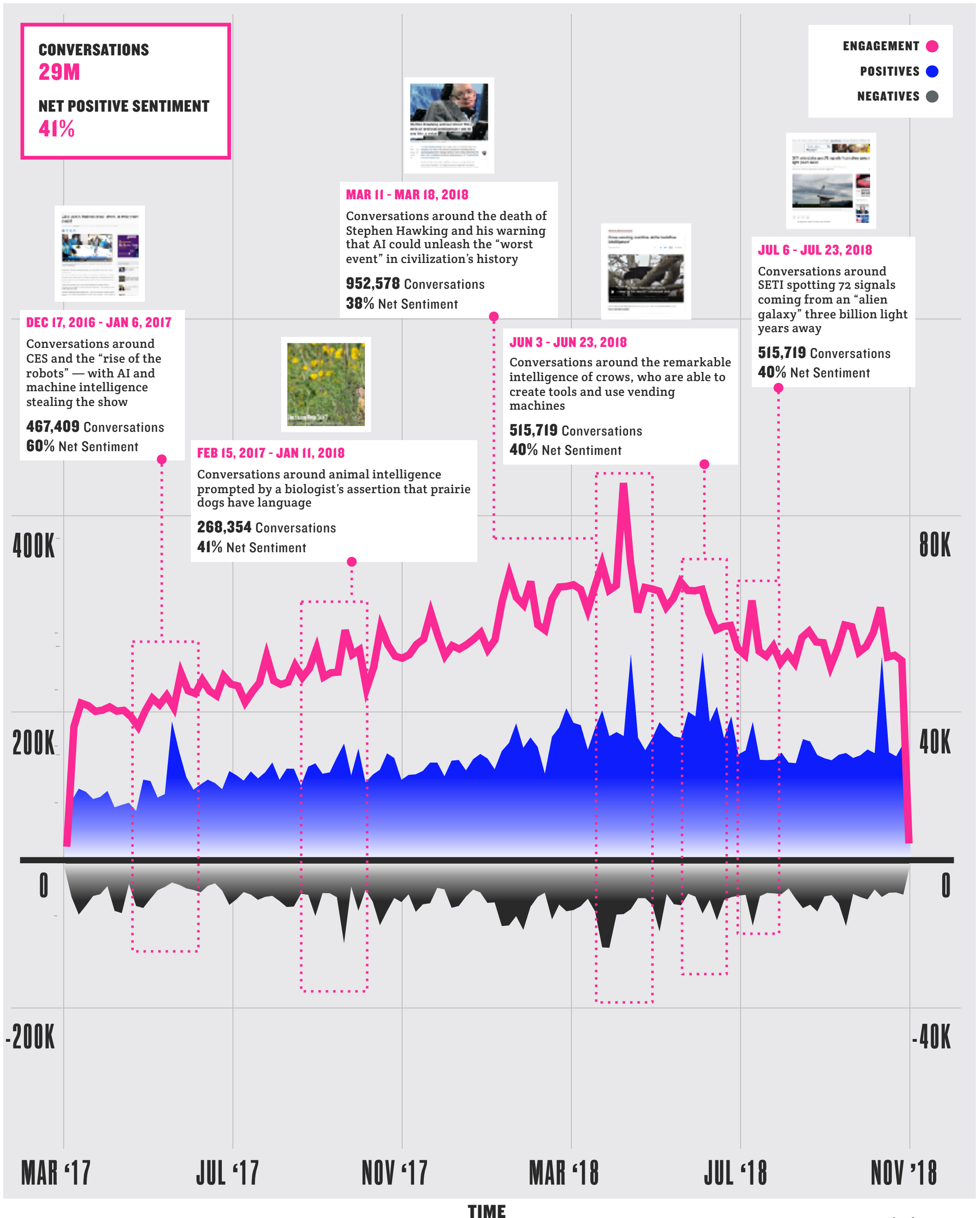
% who say "yes"

Country	%
RUSSIA	77
MEXICO	73
JAPAN	72
INDIA	72
ITALY	68
CANADA	67
SWEDEN	65
SOUTH KOREA	64
GLOBAL	61
SPAIN	60
UNITED STATES	59
GERMANY	57
UNITED KINGDOM	55
BRAZIL	54
SOUTH AFRICA	42
INDONESIA	41

Source: Glocalities

Figure 25.0

THE YEAR IN RETHINKING HUMANITY

What are people saying?
Here are the topics that triggered some of the most energetic and polarizing conversations in 2018.

CONVERSATIONS
29M

NET POSITIVE SENTIMENT
41%

ENGAGEMENT ●
POSITIVES ●
NEGATIVES ●

MAR 11 - MAR 18, 2018

Conversations around the death of Stephen Hawking and his warning that AI could unleash the "worst event" in civilization's history

952,578 Conversations
38% Net Sentiment

JUL 6 - JUL 23, 2018

Conversations around SETI spotting 72 signals coming from an "alien galaxy" three billion light years away

515,719 Conversations
40% Net Sentiment

DEC 17, 2016 - JAN 6, 2017

Conversations around CES and the "rise of the robots" — with AI and machine intelligence stealing the show

467,409 Conversations
60% Net Sentiment

JUN 3 - JUN 23, 2018

Conversations around the remarkable intelligence of crows, who are able to create tools and use vending machines

515,719 Conversations
40% Net Sentiment

FEB 15, 2017 - JAN 11, 2018

Conversations around animal intelligence prompted by a biologist's assertion that prairie dogs have language

268,354 Conversations
41% Net Sentiment

ENGAGEMENT

400K — 80K

200K — 40K

0 — 0

-200K — -40K

POSITIVES AND NEGATIVES

MAR '17   JUL '17   NOV '17   MAR '18   JUL '18   NOV '18

TIME

Source: sparks & honey, Q™

SOCIAL VERBATIMS:
RETHINKING HUMANITY

When consumers discuss issues related to Rethinking Humanity, they talk about a very broad spectrum of nonhuman intelligence as informing how we define "human" — from animals to machines to extraterrestrials. They also discuss the roots of the human in our genome.

HIGHLIGHTING NEW WAYS OF THINKING ABOUT INTELLIGENCE

@mira__e   November 18, 2018

When you think of the man-decades of AI research wasted on trying to crack the Turing Test (resulting only in "artificial stupidity") when we could have been looking at real nonhuman intelligence.

@ath__e   December 16, 2018

Orcas can learn to speak dolphin!

It is well known that orcas are extremely intelligent and have very complex languages (and even regional dialects), but recent research has suggested these amazing animals have an ability so far undocumented in nature - the ability to learn another language.

Orcas can learn to speak dolphin

SHOCK AT ANIMAL INTELLIGENCE

SNARK ABOUT HUMANITY AND ITS FOIBLES

@soca__l   December 18, 2018

If I was an alien civilization and spent any time studying this planet and it's human occupants, I wouldn't want to talk to us, either. In fact, I live here, and mostly don't like other humans. #SciFiChat

#SciFiChat Q2: Why won't ET talk to us? Was it something we said? Does our planet smel bad?

#SciFi #UFO #SETI

@bell__k   December 20, 2018

Today it has been announced that Japan will RESUME commercial whaling next year. This is one of the most cruel, barbaric & archaic practices. It threatens not only one of the most intelligent species on earth, but also the complex ecology of the ocean.Pls RT & openly oppose this.

EXHORTATIONS TO BE MORE MINDFUL OF ANIMAL RIGHTS

PARANOIA ABOUT EXPLORATION AND EXPERIMENTATION BEYOND WHAT'S "NATURAL"

@soca__l   December 18, 2018

I'm not fine I'm not okay

#CRISPR Mice with human genes

#genome #DNA

Reshape humanity

Unnatural selection

Non random mutation

"Evolution" ?

@ob__y   December 20, 2018

Unless we're careful to avoid sans serif fonts, future intelligent life forms might conclude that Earth-based humans self-destructed due to some guy named "AI" who reached The Singularity.

JOKES ABOUT THE RISE OF THE ROBOTS

CULTURAL SIGNALS:
RETHINKING HUMANITY

How is culture responding to the Rethinking Humanity trend? By finding new ways to stretch our definition of human through research, the applied science of genomics and eye-opening stunts.

THE UK PARLIAMENT INVITED A ROBOT TO TESTIFY ABOUT AI

In October, a UK committee invited a nonhuman to testify before it for the first time in history. Pepper, a bot developed by SoftBank Robotics, served as a witness in a debate on artificial intelligence and robotics. Of course, Pepper was preprogrammed with answers to questions submitted in advance, leading to criticism from the AI research community of the move as a feckless publicity stunt. "This is just a puppet show," said researcher Roman Yampolskiy.

SPERM DONORS AND THEIR CHILDREN ARE ASSERTING THEIR GENETIC RELATIONSHIPS

Using genetic testing kits and donor information clearinghouses, at least 24 biological children of 57-year-old sperm donor Peter Ellenstein reached out to contact him. Despite initial reluctance, he eventually chose to meet with them, and now meets them regularly for "family" dinners. Ellenstein has also since signed a contract with two television producers who are pitching his life story around town as a documentary series with the working title "All Peter's Children."

A TINY FISH CAN RECOGNIZE ITSELF IN A MIRROR. DOES THIS BREAK OUR CONCEPT OF INTELLIGENCE?

New research suggests that the cleaner wrasse—a tiny, tropical reef fish—can recognize itself, the first fish to do so. Only those regarded as the brainiest non-human species on Earth have passed the mirror test: great apes, dolphins, elephants and magpies. But the new research is challenging the idea that self-awareness is purely the domain of an elite set of intellectually gifted mammals and birds.

Source: Los Angeles; Technology Review; National Geographic

60 percent of Americans say gene editing would be appropriate to reduce an individual's risk of developing a disease of their lifetime. Just 19 percent thought that gene editing to increase intelligence would be an appropriate use of the technology.

— *Popular Science*

TRENDS 14 & 15
BLANK LIKE ME
+
INSTANT COUNTERCULTURE

outsiders
welcome

privacy
rights

squealing

Emerging Trends are just starting to gain traction; given the rapid pace of culture, they deserve eyeballs among brands, organizations and curious readers

TREND 14

BLANK LIKE ME

People are purposely opting out of being identified or defined at all, out of a desire to control their privacy — or sheer exhaustion.

ELEMENTS OF CULTURE

outsiders welcome

privacy rights

We want to hide from being defined — or even detected — by society. This purposeful design is due to the stress of being categorized in an increasingly repressive climate for many minority groups; or it stems from a desire to consciously avoid sharing data for privacy reasons; or simply from exhaustion over excessive sharing and anxiety-inducing news cycles. Indeed, psychologists are advocating for active measures to deal with such relentless demands, or "headline stress disorder. "

People who mask their identities may purposely skew their taste profiles and shopping habits; build fake social profiles; or hack data requests by creating personas that have little to do with their real identities. Innovations are popping up to help our growing desire to hide in plain sight, such as facial recognition-defying fashions. And for those seeking to disappear for longer periods, an escape to secluded and unconnected destinations, free of wifi, are the new travel premium.

The expectation that we must always be in some way detectable, reachable or visible via technology and to each other means that those who do actively choose a time-out provoke conspiracy theories about their death; just ask Avril Lavigne or Richard Simmons, who were forced to finally admit through official channels that they were indeed very much alive.
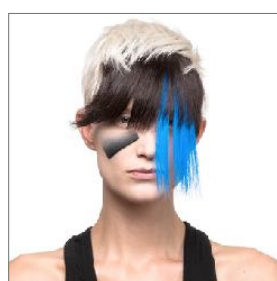
SIGNALS

Taylor Swift's facial recognition on concert audience

Finsta / Rinsta
Fake Instagram
Real Instagram

Hide with anti-recognition camo

The agender flag

INSTANT COUNTERCULTURE

**Inventing and adopting new symbols of marginalized identity in real time.**

ELEMENTS OF CULTURE

outsiders welcome

squealing

Counterculture is a fundamental part of all societies, but new antiestablishment phenomena are now evolving and expressing themselves in real time — and vanishing just as quickly, lasting just weeks, days or even a few minutes. The ease of information sharing is fueling these pop-up microtribes, which can generate from channels like 4chan or Reddit or emerge as spontaneous feedback to a celebrity or political gaffe. The pace of cultural evolution causes them to fade out rapidly as new urges or outrages replace them.

The trend of Instant Counterculture has therapeutic motivations, however fleeting they may be. As the loneliness epidemic rages and more people are living alone than ever before, turning to micro-moments of belonging is a way to have our voices heard in the collective and band together in a moment of outrage empathy, but ultimately, perhaps for our own benefit.

SIGNALS
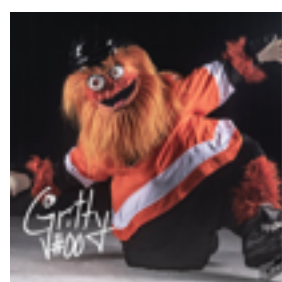
*The Cult
of Gritty*

Desponsoring

*Gamergate/
Comicsgate*

*#GoFund
TheWall*

70% of female Chinese college students say they've been subjected to sexual harassment. 50% say they have no effective means to report or respond to the incidents.

— "China's #MeToo Activists Have Transformed a Generation," Foreign Policy

IMPLICATIONS FOR BUSINESS AND ORGANIZATIONS: OUTSIDERS WELCOME

1 __

DON'T SNEAK UP ON YOUR CONSUMER

Using algorithms to decode identities, attitudes and preferences can empower both brands and consumers. But acting on them without warning leads to creepiness. Be open, intentional — and let consumers opt out.

KEY CATEGORIES IMPACTED:

Technology, retail/e-commerce, travel & transportation, media

2 __

MAKE SURE YOUR FRAMEWORKS ARE BUILT TO EVOLVE

Brands are often tempted to try to get ahead of the rapidly shifting curve around societal norms by putting hard stakes in the ground. Avoid cultural obsolescence by change-proofing comms, UX, vocabulary and service.

KEY CATEGORIES IMPACTED:

Media, beauty, retail, e-commerce, healthcare

3 __

EMBRACE THE MODERN FAMILY

Dispense with the notion that family requires bonds of blood. More and more consumers have idiosyncratically unique views of "family" they expect to see accommodated — from furkids and "framily" to DNA relatives.

KEY CATEGORIES IMPACTED:

**Consumer packaged goods, food & beverage, retail, apparel**

4 __

LEAN INTO AP — NOT JUST AI

Consumers expect brands to be human; the machine intelligences that rep your brand in commerce, service and communications need to express that humanity, with values and personalities that align with yours.

KEY CATEGORIES IMPACTED:

Retail/e-commerce, travel & transportation, banking, technology
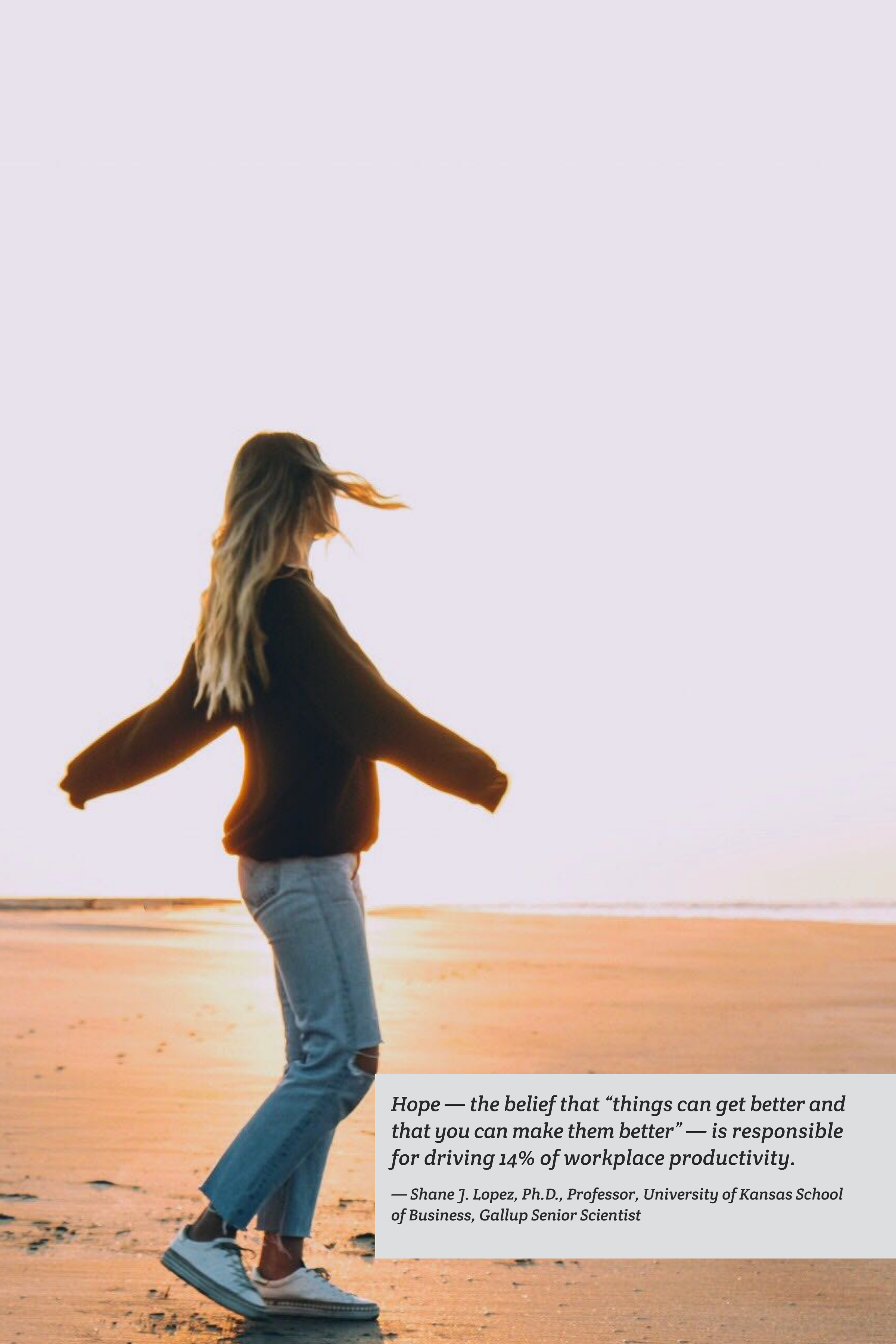
Hope — the belief that "things can get better and that you can make them better" — is responsible for driving 14% of workplace productivity.

— Shane J. Lopez, Ph.D., Professor, University of Kansas School of Business, Gallup Senior Scientist

FINAL THOUGHTS

What is hopepunk?

A mood of consciously chosen gentleness. "Being soft is not a weakness," wrote Nikita Mor in 2017. "It's what makes you strong."

A worldview that argues that the fight to build positive social systems is a fight worth fighting.

A depiction of the fight to achieve human progress as something permanent, with no fixed 'happy' end.

A sense of self-awareness about weaponizing kindness and optimism — and even emotion itself — in the face of that fight.

Aja Romano, vox.com, December 27, 2018

ENDNOTE:
AS WE ENTER 2019

The clearest signals of the changes we're about to see in 2019 fittingly came at the very end of 2018, as a series of last-minute events highlighted how the year to come will be shaped by blurred identities and alternative realities, hidden conspiracies and strange bedfellows, unforced errors and unintended consequences.

Far-right insurgent Jair Bolsonaro was sworn in as the new president of Brazil, leading to a rush of same-sex couples to get married before the "proud homophobe" could make such unions illegal. Meanwhile, as the most diverse U.S. Congress in history was poised to be sworn in on Capitol Hill, the U.S. government shut down, with President Trump vowing to get a border wall built by any means possible. In the UK, it became increasingly apparent that a worst-case scenario might come true: A "no-deal Brexit," in which the country catastrophically leaves the EU without assurances or transition plans. And in France, a new icon of antiestablishment resistance spread: the high-visibility yellow vest.

In 2019, the future will be more malleable than ever.

Beginning with a massive uprising on November 17, hundreds of thousands of protesters poured into the streets of cities across the nation in multiple waves of rallies, wearing the yellow safety vests that all French motorists are required by law to keep in their cars.

Profiles of *gilet jaunes* protesters revealed that they included a diverse array of views and backgrounds: the far left and far right; individuals motivated by economic justice and by cultural nationalism; lower-class workers and well-off entrepreneurs. The movement has been called "leaderless" and "structureless" — a pop-up movement organized by viral transmission. By December, yellow vest protests had spontaneously arisen in countries ranging from Germany to Finland, Portugal and Canada.

But the impact of these upheavals across the Western hemisphere may well be dwarfed by the growing sense of risk in the world's largest emerging economy.

In November, it was revealed that as many as a million members of China's Muslim minority — predominantly Uighurs, but also Kazhaks and Kyrgyz — had been detained in mass "indoctrination" camps and subjected to coercive reeducation. In December, after Canada announced the arrest of top Chinese tech executive Meng Wanzhou, China detained several Canadians in an apparent tit-for-tat maneuver. Industries as varied as bike-sharing and peer-to-peer lending have undergone catastrophic collapse. And even as the country's annual GDP growth rate fell to an official 6.6% — the lowest pace in two decades — it was also announced that its birthrate had plummeted by two million from the year before, leading to concerns that the two-child policy designed to stem a demographic death spiral was failing.

All of this confirms that 2019 will be a year of unprecedented volatility, with virtually everything we might have once considered secure or sacred in flux. But this very uncertainty means that the future is more malleable than ever before. To requote Mohsin Hamid, this year we will be challenged to "imagine desirable futures," not just for ourselves, but for the world — and to make the investments necessary to bring them to fruition, because a future framed by the unchecked impulses of the "violently nostalgic" is not one from which business or society can benefit.

So where can we turn for inspiration in the push toward this challenge? Perhaps to a concept that went viral in the fading embers of 2018: "Hopepunk." Writing for Vox in December, Aja Romano called hopepunk "a narrative message of 'keep fighting, no matter what'…not a brightly optimistic state of being, but an active political choice, made with full self-awareness that things might be bleak or even frankly hopeless, but you're going to keep hoping, loving, being kind nonetheless."

Food for thought, and fuel for the future.

THE TEAM

reports.sparksandhoney.com
@sparksandhoney

Anna Sofia Martin
Editorial Director

Jeff Yang
VP, Head of Global Futures

Camilo La Cruz
Chief Strategy Officer

Terry Young
CEO & Founder

CREATIVE

Eric Kwan Tai Lau
Director, Visual Intelligence

Julian Acevedo
Jr. Visual Designer

RESEARCH & CULTURAL INTELLIGENCE

Olivia McLean
Director, Cultural Strategy

Chelsea St. Clair
Jr. Cultural Strategist

Annalie Killian
VP, Strategic Partnerships

CONSULTANCY

Paul Butler
Chief Operating Officer

Sharon Foo
Managing Director

Kristin Cohen
Head of Business Development

Caitlyn Acosta
Project Manager

sparks & honey